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ABSTRACT

This second volume of a two-volume final report contains appendixes to Volume I, the description and findings of a 3-year research and demonstration project in which the Utah State University Manpower Development Service (MDS) was established to provide technical assistance to private and public agency employers for improving personnel systems, training approaches, and other manpower management practices. Included in the appendixes are the MDS brochure, the data collection instruments, report of MDS services provided to the Utah needlecraft industry, the revised 1974-75 MDS plan of work, economic and social characteristics of Utah, selected MDS cases, members of the MDS advisory council, outline of MDS training program for human resource analysts, outline of Utah State University's master's degree program in human resource development, description of a manpower management training workshop for local government officials, and a proposal to provide consulting services to Northern Wasatch Association of Governments. (JT)

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MANPOWER ADVISORY SERVICES IN THE WORKPLACE: A MISSING LINK IN NATIONAL MANPOWER POLICY

VOLUME II - APPENDICES

by

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VOLUME II - APPENDICES

		PAGE
A	MDS Brochure	1
B	Data Collection Instruments	2
C	Report of MDS Services Provided to Utah Needlecraft Industry	55
D	Revised 1974-75 MDS Plan of Work	66
E	Economic and Social Characteristics of Utah	71
F	Selected MDS Cases	81
G	Members of MDS Advisory Council	105
H	Outline of MDS Training Program for Human Resource Analysts	106
I	Utah State University Master's Program in Human Resource Development	119
J	Manpower Management Training Program for Local Government Officials	128
K	Proposal to Provide Consulting Services to Northern Wasatch Association of Governments	142

APPENDIX A

MDS Brochure

A UNIQUE SERVICE TO PUBLIC AND PRIVATE EMPLOYERS

Manpower Development Service is a human resource consulting service created to provide a specialized form of diagnostic and technical assistance to public and private employers in Utah and the Intermountain West.

A unique aspect of the assistance provided is the emphasis on the self-help concept, which stresses the further development of an employer's competence to deal with his manpower problems on a continuing basis after the termination of direct MDS assistance.

TYPES OF ASSISTANCE PROVIDED

MDS can assist employers to:

- Identify human resource problems and determine training needs.
- Analyze problems through in-depth organizational analysis and formulate possible solutions.
- Design and implement proposed solutions and training programs when necessary.
- Develop the competence within the organization to perform the above steps.

The assistance provided by MDS will be tailored to the specific needs and desires of the individual firms.

TO QUALIFY

Any public or private organization employing a work force or planning to establish an enterprise in the Intermountain area may apply to MDS for assistance. The nature and extent of MDS involvement will be determined through mutual discussion and agreement.

BENEFITS OF EMPLOYERS PARTICIPATION

An employer may expect one or more of the following results from cooperative action with MDS:

- Increased productivity
- More efficient use of manpower
- Better trained supervisors
- Improved morale and motivation
- Closer employee identification with company objectives
- Decreased turnover, absenteeism, waste, worker alienation, and other human resource costs
- In-plant diagnostic and training capabilities

CHARGES FOR SERVICES

MDS diagnostic assistance is provided without charge. Occasionally, with prior approval of client firms, charges may be made for direct expenses (travel, materials, etc.) associated with individual projects. Such charges will be nominal. MDS is jointly funded by USU and the U. S. Department of Labor.

REPORTING REQUIREMENTS

No reports are required of firms using MDS services.

CONFIDENTIAL NATURE OF SERVICES

Information of a confidential nature, disclosed during the course of providing diagnostic services, will be held in complete confidence.

APPENDIX B

Data Collection Instruments

GOALS OF EVALUATION

Why evaluate? There are two main reasons: (1) for correction and improvement, and (2) for proof of results.

Evaluation data provide feedback for modifying approaches, techniques, etc., to achieve better results. We should learn from our past experience, but how can we learn if we do not know what happened? To know what happened, we must measure the results, and that process is evaluation. It certainly would be useful if our evaluation system could give us such information as, for example, which entry organization levels promise better chances for changing the client firm.

Washington wants to know what we have accomplished with the grant monies. Prospective clients are interested in what actual help we have given to other organizations. Evaluation data form the basis for answering the question, "What have we accomplished?" Wouldn't you be impressed as a prospective client if the HRA could say to you, "We have been effective in reducing turnover by at least 20% in over one-third of the organizations we have worked with, and we have the data to show it?"

What type of information do you think will interest Washington more, a vague statement, such as: "We have worked with quite a few firms, and we think we have had a substantial influence with some of them," or a table which shows the number of firms broken down by industry group and the improvement in absenteeism for each group?

EVALUATION IS THE RESPONSIBILITY OF EVERYONE ON THE MDS TEAM. The evaluation group has designed the research plan and the data collection instruments with the guidance of the operational team. Operationals are responsible for collecting the data and recording them accurately on the forms. Coders (who may be either intern or student assistants) transfer the data from the instruments to coding forms for keypunching onto computer cards. Evaluators program the computer using the SPSS (Statistical Package for the Social Sciences) and feed the data in. The entire MDS team should analyze the data output to determine operational guidance and evaluation documentation.

Evaluation should be an on-going process. It should be the basis for planning rather than a haphazard afterthought. HRA's should let the following two questions guide them in designing an involvement with a client:

1. WHAT DO WE WANT TO ACCOMPLISH?

2. HOW CAN WE MEASURE THE RESULTS?

By treating these questions, an HRA will be results-oriented. He will have in mind some specific objectives and a method for measuring how well he will have reached them. If a change is to be shown, measurements should be taken before any intervention and compared with measurements after the involvement.

Keep in mind that there are four levels of measuring in evaluation (Kirkpatrick, Donald L., "Techniques for Evaluating Training Programs, Journal of American Society for Training and Development).

1. Reaction. e.g., What was your reaction to MDS? To the training program? How did you like what MDS did for you? A climate of anonymity is best for obtaining honest reactions.

2. Learning. e.g., What did you learn from MDS? What principles, facts, or techniques did you learn from the training program? A workshop participant may feel that the lecturer was great (reaction), but he may not be able to remember anything that was said (learning). Measurements should be taken BEFORE AND AFTER, through pre-test and post-test, so that learning from a particular program can be isolated.

3. Behavior. e.g., What are you doing differently on the job now due to the influence of MDS? What is your appraisal of worker performance now as compared to before MDS became involved with your organization? Learning principles and techniques is one thing, but carrying them one step further into using them on the job is quite another.

4. Results. e.g., What was the improvement in turnover, absenteeism, grievances, productivity, etc., due to the influence of MDS? How much did MDS help you reduce your costs or increase your profits? This level measures the tangible payoff. On-the-job behavior may change, yet have no observable effect on how the organization performs. It is difficult to separate the individual causes of results because the organization is continually affected by many factors. Also, there may be a considerable time lag before benefits from an intervention show up as results.

The first level, reaction, is easiest to measure, but the least meaningful. Each level increases in difficulty of measurement and becomes more rigorous.

The primary objective of the MDS evaluation system is to find out what impact MDS has had in its clients' firms. More specifically, we are interested in the effect of different concepts and practices on that impact, e.g., Advisory Council, self-help, MDS model, different methods, multiplier effect, manager commitment, types of firms, aggregation levels, university base, funding, MDS organization, restrictions in the firm, age of the organization, length of time involvement, etc. The type of research involved is that of finding relationships between variables with the possibility of discovering some causes and effects.

Change in the client organization will be measured in terms of hard data, e.g., turnover, absenteeism, and other RESULTS-type variables, and in terms of soft data, e.g., attitudes and other changes in BEHAVIOR. LEARNING and REACTION will also be measured.

The variables that affect the change occurring in a firm can be classed into four areas:

1. Past factors and existing conditions determined by the past.

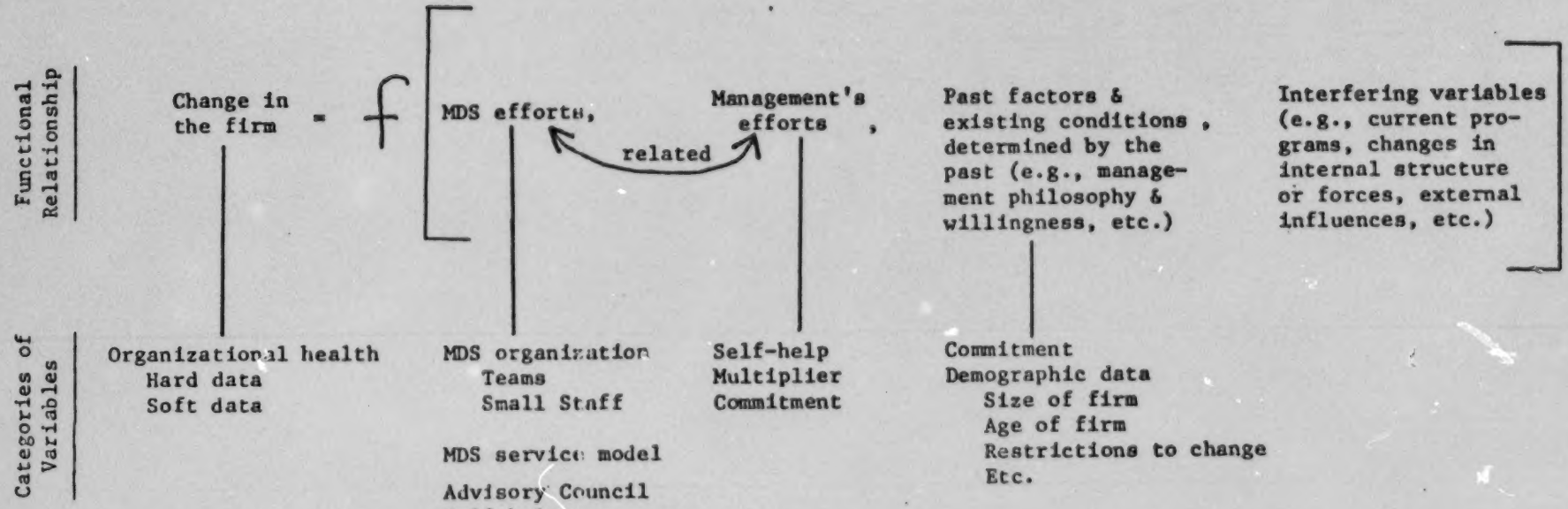
2. Management's present efforts to effect change.

3. MDS's efforts to intervene.

4. Interfering variables, e.g., influences external to the organization.

The MDS evaluation system attempts to measure many variables in all four areas. The effects of the different variables are to be separated using statistical analysis. The following chart summarizes the design of the hypothesis in functional notation.

EVALUATION RESEARCH DESIGN

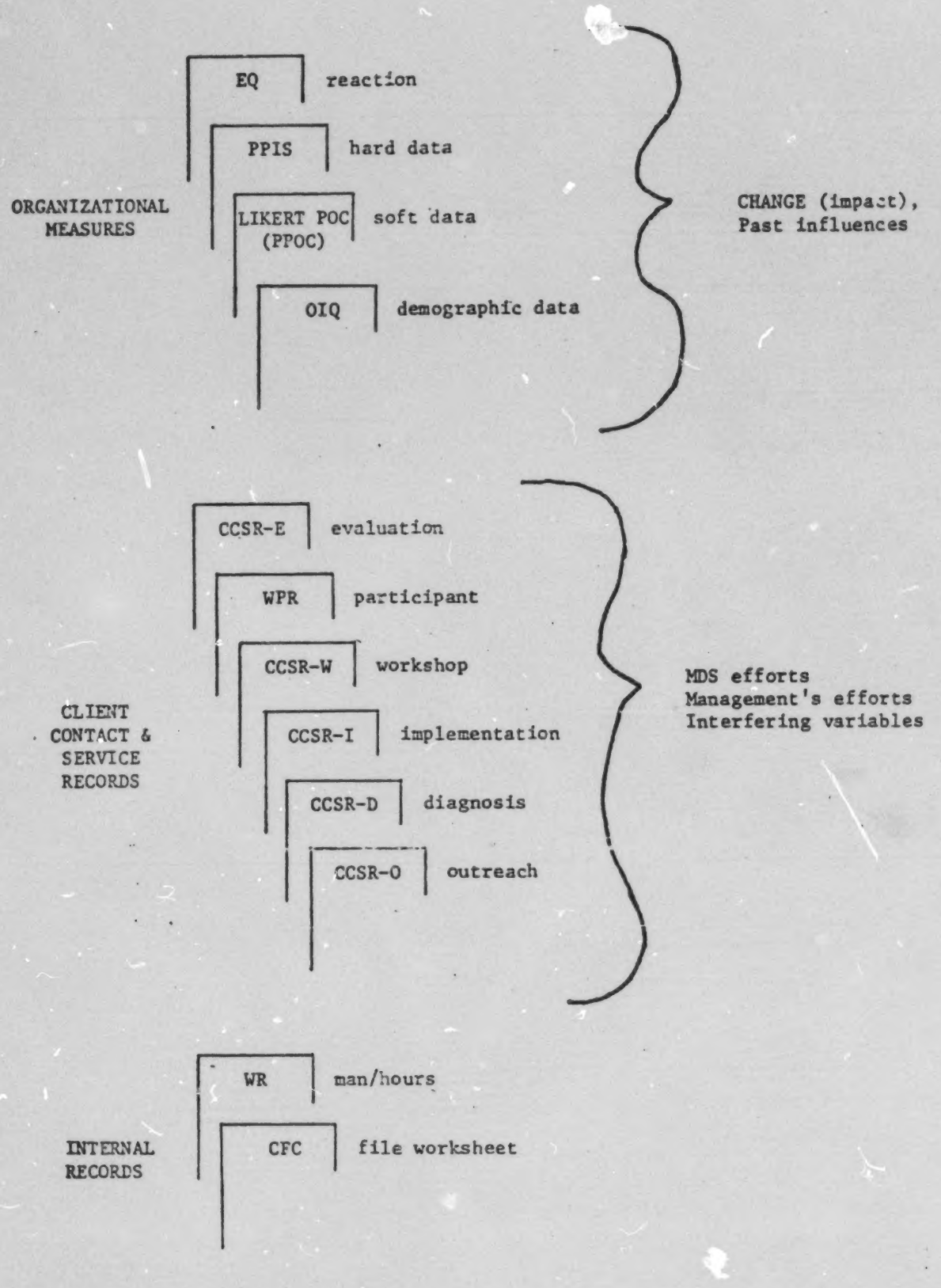


CURRENT DATA COLLECTION INSTRUMENTS

Collection of data is critical to the evaluation process. The results are only as good as the data that go into the analysis. Become very familiar with all of the forms and how to use them, so you can be effective in gathering the proper information. The instruments currently in use are:

1. Organization Information Questionnaire - OIQ 2/11/74
2. Personnel and Performance Information Sheet - PPIS 2/11/74
3. Preface to Likert's Profile of Organizational Characteristics - PPOC 2/11/74
4. Rensis Likert's Profile of Organizational Characteristics - POC
5. Client Contact and Service Record-Outreach - CCSR-O 2/11/74
6. Client Contact and Service Record-Diagnosis - CCSR-D 2/11/74
7. Client Contact and Service Record-Implementation - CCSR-I 2/11/74
8. Client Contact and Service Record-Workshop - CCSR-W 2/11/74
9. Client Contact and Service Record-Evaluation - CCSR-E 5/10/74
10. Evaluation Questionnaire - EQ 5/10/74 (attached to CCSR-E)
11. Workshop Participant Report - WPR 2/11/74
12. Client File Checklist - CFC 5/10/74
13. Weekly Record - WR 2/11/74
14. Client Firm Checklist Appendum CFC-A 10/23/74
15. Evaluation Appendum EA 9/23/74

The general areas of coverage of the different forms are illustrated in the following diagram.


EQ
reaction
PPIS
hard data
ORGANIZATIONAL MEASURES
LIKERT POC (PPOC)
soft data
OIQ
demographic data
CHANGE (impact), Past influences
CCSR-E
evaluation
WPR
participant
CCSR-W
workshop
CLIENT CONTACT & SERVICE RECORDS
CCSR-I
implementation
CCSR-D
diagnosis
CCSR-O
outreach
MDS efforts
Management's efforts
Interfering variables
WR
man/hours
INTERNAL RECORDS
CFC
file worksheet

Use of Each Form

Below are given brief instructions on the use of each form.

OIQ: Fill out as completely as possible for each client organization (indicate whether completed by MDS or by client organization).

PPIS: Use whenever possible to obtain hard data for evaluation of change; help client use it as part of an information system.

PPOC: Complete each time the POC is administered.

POC: (Likert) Use whenever possible to collect attitudinal data; should be administered to the same client at different time intervals to measure change.

CCSR's: Use to report contacts with clients.

- OUTREACH: Use for client contacts and marketing contacts (letter, telephone, and personal contacts either by MDS or by client)
  - Initial contact
  - Group presentation
  - Outreach follow-up
- DIAGNOSIS: Planning further involvement (e.g., designing diagnosis or implementation procedures)
  - Data collection
  - Analysis of data
  - Development of strategy
- IMPLEMENTATION: Complete at least one for each client for whom we perform diagnosis or implementation
  - Planning implementation procedures
  - Implementation of strategy
  - Follow-up on implementation (whether or not MDS was directly involved in implementation)
- WORKSHOP: Use for each workshop session
- EVALUATION: Evaluation of MDS involvement with client
  - Evaluator: Complete Page 1
    - Use Pages 2 & 3 for a structured interview
    - Have client complete Page 4 (Evaluation Questionnaire - EQ)

WPR: Keep up to date for each workshop participant and/or aggregate of participants.

CFC: Evaluator: Use to check completeness of file
HRA Coordinator: Use to rate MDS impact on the client

WR: Keep current daily and total the hours by category on the back weekly

Example forms, completed for hypothetical cases, are included in the Appendix.

EVALUATION FRAMEWORK FILING SYSTEM AND PROCEDURES

Filing System

1. A separate hanging file will be kept for each client organization with which we have had initial contact, whether or not further involvement takes place. (An organization becomes a client when an initial meeting is held for the purpose of explaining and offering MDS services. The HRA will indicate at the top of the CCSR-O whether the contact was for a client or a marketing activity.) All client files will be assigned identification numbers and will be maintained in alphabetical order in the "CLIENT FIRMS" file drawers.

2. Records of marketing contacts (with non-clients, referral-source organizations, etc.) will be kept in the file drawer titled "MARKETING ACTIVITIES." Hanging files may be maintained alphabetically for specific organizations or for general categories. Files on organizations will not be given numbers until they are considered to be client organizations.

3. A separate hanging file will be kept for each workshop (not each session--manila folders may be used to divide the file into sessions). All workshop files will be given identification numbers and will be filed alphabetically together in the "WORKSHOPS" drawer.

4. a. CCSR-W's will be filed in the workshop file;

   b. Weekly Records (WR) will have a separate file;

   c. CCSR-O's may be filed in the client files OR in the marketing activities file;

   d. All other forms (OIQ, PPIS, PPOC, POC, CCSR-O, CCSR-D, CCSR-I, CCSR-E, CFC, and WTR) will be placed in the proper client file.

5. Currently completed forms will remain in a basket for a few weeks before being filed. This current basket should be useful for three purposes: (1) HRA's will be able to keep current on each others' activities; (2) Evaluators will be able to follow up to make sure the necessary forms are being completed; (3) Coders will know when there are new forms to be coded.

Filing Procedures

1. HRA's are responsible for completing the proper forms.

2. Completed Weekly Records (WR) will be filed chronologically.

3. All other completed forms will be placed in the current basket where they will remain for a few weeks. Then the administrative assistant will:

    a. Make new files for any new client organizations, new workshops, or new marketing activities.

    b. File all completed forms in the proper client files, workshop files, or marketing activities files.

4. A Client Identification Number will be assigned to each new client chronologically (and a Workshop Identification Number to each new workshop) and entered into a bound book. The number will be stamped on the file and on forms corresponding to the new client. Marketing contacts will not be given a Client Identification Number, and only information connected with organizations which have Client Identification Numbers will be coded for computer processing.

SECTION 9

RULES AND STANDARDS FOR USING THE FORMS

A. General

1. Be sure to record any significant information which may not be called for specifically on the forms. Such information could be used for documentation in a case-study type write-up.

2. The HRA Coordinator should fill out the CCSR and WPR forms. Before doing so, he should coordinate the work codes and man/hours with all other HRA's who participated so that the Weekly Records will be consistent with the man/hours reported on the CCSR's. (Man/hours are calculated by adding the hours spent by all HRA's for the particular activity.)

3. Be sure to list the Coordinator first under "MDS STAFF MEMBER(S)" on the CCSR's.

4. Include the year in all dates on all forms (be optimistic about the project).

5. If only the month and year is given in the date for initial contact, the day will be considered to be the end of the month for the purpose of assigning Client Identification Numbers.

6. When a form is coded, a red check mark (✓) should be made across the heading of the form.

7. Results of more than one contact may be reported on one form (e.g., CCSR's). Condense data (reduce the number of forms per client) where possible rather than repeating non-changing information. We are interested mainly in initial ratings and any subsequent changes. Repetition of the same information is of little value.

8. It will help the coders if the date is written: DAY, MONTH, YEAR, e.g., 5 Feb 74.

B. OIQ

1. The OIQ is the "master document" on each client. Organization name, address, and phone number as well as all other information should be as accurate and complete as possible.

2. Questions related to the manager (e.g., years in supervisory position) should be answered by or for the Focus Level manager.

3. If there is a difference of opinion between the client and the HRA on any items (e.g., industry outlook, the HRA may make comments in the margin or fill out another OIQ and attach it. Make it clear by checking on the first page who completed the form.

4. The OIQ data to be used is for the time to which the information pertains.

5. If there are two OIQ's for one client, the one completed by the organization will be coded as the first OIQ, and the one completed by MDS will be the second.

C. PPIS

1. Some sort of manpower accounting is needed in organizations if they are to be informed about their problems. The PPIS may be used as a report for a human resource information system.

2. If only the total number of people leaving a firms is given (rather than the numbers of quits and terminations), the figure should be placed under "Number of quits."

3. On the old PPIS's, data for the year will have to be recorded in December, but should be coded under "For the year."

D. POC (Likert)

1. If possible, when administering the POC to a group of people, read the instructions aloud to them while they follow along.

2. Emphasize in the instructions that the questions are to be answered ". . . the way you see things or the way you feel about them."

3. If, and only if, the respondents ask about whether to answer for the specific or the general, tell them to answer for the general, average situation in the organization (company or department, as desired by the HRA). Do not volunteer this explanation, because it may bias the results. Only use it in response to individual questions.

4. Point out that the questions are easier to understand if the responses on the scale are read. The scale is often more clear than the root question.

5. Question 2a. (Item 4): If they ask, "Whose attitudes?" reply, "The attitudes of employees in general."

6. Question 3c. (Item 7): You may need to explain that "line organization" means formal organization.

7. Question 4a. (Item 8): If they ask, "Interaction between whom?" answer, "Interaction between people in the organization."

8. Question 6b. (Item 15): There may be a question on what goals are accepted by whom. If so, answer, "How the organization's goals are accepted by the employees in general." Also, two words in this item may need definition: overtly = openly; covertly = secretly (hidden).

E. CCSR-O

1. "ENTRY LEVEL" is the organization level of first contact.

2. "HIGHER SUPPORT LEVELS" refers to the higher organization levels where support to MDS is given.

F. CCSR-D

1. "FOCUS LEVEL" refers to the organization level where the main contact and working relationship is maintained.

2. Include results of diagnosis under "COMMENTS" (i.e., problems identified and recommendations).

3. Quality of assignments, extra work, and behavior change grade values will be coded as follows: A = 40, A- = B+ = 35, B = 30, B- = C+ = 25, C = 20, C- = D+ = 15, D = 10, D- = E+ = 05, E = 00.

G. CCSR-I

1. Please fill out a CCSR-I for clients where diagnosis has been done even if MDS is not directly (or at all) involved in implementation. A diagnosis follow-up visit may be necessary.

H. CCSR-W

1. "INVOLVEMENT OUTSIDE OF WORKSHOP SESSIONS IN THE ORGANIZATION(S)" refers to the time period since the previous session.

I. WPR

1. This form may be completed for an individual participant or for an aggregate group of participants, whichever seems more appropriate. Indicate which is the case at the top of the form.

2. Number the WPR's for each workshop (not each session). Individual "Participant Numbers" begin with 01. Aggregate "Participant Numbers" begin with 80. Where possible, aggregation should be made by organization level so that only one participant "Level" will be indicated on each WPR.

3. Rate "Participation" in terms of quantity (amount) rather than quality. Quality of participation should be included in "Reaction to this Session."

4. "Total number of sessions held" refers to the workshop in question and may be different from the number of sessions to which a participant was invited.

J. WR

1. HRA's (Human Resource Analysts) should complete one of these forms for each week. Interns and other staff members should complete WR's when they are involved with client firms.

2. The WR is not a time card, hours do not have to total to the staff member's time commitment. Record time only for activities listed on the sheet.

THE HRA'S GUIDE TO DOCUMENTATION AND EVALUATION

Activity	Forms and Documentation
Initial contact	CCSR-O OIQ PPIS
Planning the involvement	What objectives? How to measure results?
Closing the deal	CCSR-O OIQ PPIS Likert
Diagnosing	CCSR-D What problems? What recommendations? Likert
Implementing	CCSR-I What strategy
Following-up implementation	CCSR-I Likert PPIS
Holding workshop	CCSR-W WPR's
Evaluating	CFC CCSR-E EQ Likert PPIS

SAMPLE FORMS

For Focus Level
OIQ 2/11/74 19
Completed by:
MDS ☐ Org. ☐
CLIIDNUM_____

ORGANIZATION INFORMATION QUESTIONNAIRE

Date_____

Organization name_____ Phone:_____

Address_____

Your name_____

Title_____

Organization level (check those that apply)

___1. Worker
___2. Lead man or woman
___3. First-line supervisor (foreman)
___4. Middle manager
___5. General manager
___6. Owner
___7. Staff; specify_____
___8. Other; specify_____

_____

1. Industry (check one)

___1. Agriculture, forestry, and fishing
___2. Mining
___3. Construction
___4. Manufacturing
___5. Transportation, communication, utilities
___6. Wholesale
___7. Retail trade
___8. Finance, insurance, and real estate
___9. Services
___10. Government
___11. Other; explain_____

_____

2. Product or service_____

3. Ownership (check one)

___1. Government
___2. Corporation with stock offered to the public
___3. Corporation with stock held privately
___4. Partnership
___5. Single private owner
___6. Other; explain_____

_____

4. Does a family have controlling interest in the organization? ___No ___Yes

5. Is this organization responsible to a parent organization? ___No ___Yes

a. If yes, to what extent are management services (e.g., budgeting, planning, personnel functions, etc.) made available by the parent organization? (Check the appropriate point on the scale.)

No services provided		About half of services provided		Almost all services provided
1----+----2----+----3----+----4----+----5----+----6----+----7				

b. If yes, year parent organization was founded_____

6. Year this organization was founded_____

7. Number of employees_____

8. Percent of employees having union representation_____%

9. List the problems concerning the work force in your organization and, using the scale at the right, indicate how serious they are (check one column for each problem listed).

Problems	Not Serious	Somewhat Serious	Serious	Very Serious
a. _____	___	___	___	___
b. _____	___	___	___	___
c. _____	___	___	___	___
d. _____	___	___	___	___
e. _____	___	___	___	___
f. _____	___	___	___	___

10. How long have you been in a managerial or supervisory position? ____years

11. How long have you been in your present position? ____years

12. To what extent are you willing to consider use of resources from outside your organization in dealing with personnel and organizational problems? (Check the appropriate point on the scale.)

Not at all		To a moderate extent		To a considerable extent
1	2	3	4	5	6	7

Please explain your answer_____

_____

13. In terms of the industry to which you belong, how is your organization's general outlook?

Much worse than most		About the same as most		Much better than most
1	2	3	4	5	6	7

14. What is the general outlook of your industry compared with other industries?

Much worse than most		About the same as most		Much better than most
1	2	3	4	5	6	7

15. How adequate is the labor market from which you draw employees?

A severe shortage		No shortage, supply and demand are about in balance		A great oversupply
1	2	3	4	5	6	7

16. To what extent have you used or do you now use the State Employment Security services available to employers?

Not at all — Fairly often — All the time

1----+----2----+----3----+----4----+----5----+----6----+----7

17. Have you used or do you now use other outside management services (e.g., consultants, industry associations, government organizations, etc.)?

____No ____Yes If yes, please specify_____

18. Indicate which types of training methods are used in your organization. (Check all those that apply.)

I. Job skills training

___a. On-the-job training
___b. Vestibule training (simulated operation, not on the actual production line)
___c. Apprentice training
___d. Vocational school training
___e. Programmed instruction (using teaching machines, programmed books, filmstrips, etc.)
___f. Classroom instruction
___g. Other; specify_____

II. Supervisory training

___a. On-the-job training
___b. Temporary assignment to supervisory position
___c. Seminars or conferences within the organization
___d. Seminars or conferences sponsored by other organizations
___e. Programmed instruction
___f. Classroom instruction
___g. Correspondence courses
___h. Other; specify_____

III. Management development

___a. On-the-job training
___b. Job rotation
___c. Multiple management
___d. Understudies for key positions
___e. Special assignments
___f. Visits to other sites
___g. Seminars or conferences within the organization
___h. Conferences or institutes sponsored by other organizations
___i. University management development programs
___j. Other; specify_____

RESTRICTIONS TO IMPROVING ORGANIZATIONAL EFFECTIVENESS

19. Rate each of the following in terms of the restrictions it places on making changes which could improve organizational effectiveness. (Please check the applicable point on the scale.)

	No restrictions	Moderate restrictions	Severe restrictions
a. Controls from higher in the organization	1----+---2----+----3----+----4----+----5----+----6----+----7		
b. Union (or employee organization)	1----+---2----+----3----+----4----+----5----+----6----+----7		
c. Fixed technological process	1----+---2----+----3----+----4----+----5----+----6----+----7		
d. Uncertainties of market	1----+---2----+----3----+----4----+----5----+----6----+----7		
e. Low profit margin	1----+---2----+----3----+----4----+----5----+----6----+----7		
f. Government regulations	1----+---2----+----3----+----4----+----5----+----6----+----7		
g. Seasonal nature of work	1----+---2----+----3----+----4----+----5----+----6----+----7		
h. Rapid growth	1----+---2----+----3----+----4----+----5----+----6----+----7		
i. Other, please explain	1----+---2----+----3----+----4----+----5----+----6----+----7		

_____

_____

_____

23

20. To what extent has change occurred in your organization in the past year and/or to what extent is change expected to occur in the next year in the following categories? (Please check the applicable point on the scale.)

		No change			Moderate change			Extensive change
a.	Policies and procedures	1	2	3	4	5	6	7
b.	Management and supervisory positions	1	2	3	4	5	6	7
c.	Product types	1	2	3	4	5	6	7
d.	Production methods	1	2	3	4	5	6	7
e.	Organization size	1	2	3	4	5	6	7
f.	Other, please explain	1	2	3	4	5	6	7

_____

_____

_____

PERSONNEL AND PERFORMANCE INFORMATION SHEET

Certain information from your files can be very helpful to you in diagnosing the "health" of your organization. This data may also be analyzed to evaluate the effect of changes (e.g., policy changes, training, MDS involvement, etc.). Please complete the following table. The information will be held confidential and will be used to help you evaluate your organization.

	19___												19___											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. Number of full-time and/or full-time equivalent employees*																								
2. Number of new hires																								
3. Number without previous relevant job experience																								
4. Number of quits																								
5. Number of quits who were good performers**																								
6. Number of terminations																								
7. Number of good performers terminated**																								
8. Number of grievances																								
9. Absenteeism (days)																								
10. Number of lost-time accidents																								
11. Unit labor cost; define _____																								
12. Labor and material cost of rework and waste																								
13. Other; explain _____ _____																								
Events or circumstances affecting above items (indicate by number[s] the item[s] affected)																								

* To calculate the number of full-time equivalent employees, determine the number of hours worked by part-time employees per week and divide by 40, or determine the hours worked per month and divide by 173.

** Number which performed better than 50% of persons in their job.

PPOC 2/11/74

CLIIDNUM_____

PREFACE TO LIKERT'S PROFILE OF
ORGANIZATIONAL CHARACTERISTICS

The following questions pertain to the conditions under which Likert's questionnaire was administered.

1. Organization name_____

2. Date_____

3. Number of Profiles completed_____

4. Levels to which administered (check all those that apply).

___a. Worker
___b. Lead hand
___c. Foreman
___d. Middle manager
___e. General manager
___f. Owner
___g. Staff_____
___h. Other_____

5. How many times (including this time) has the Profile been administered to this organization? _____

RENSIS LIKERT'S

PROFILE OF ORGANIZATIONAL CHARACTERISTICS (POC)

INSTRUCTIONS (Please read before beginning)

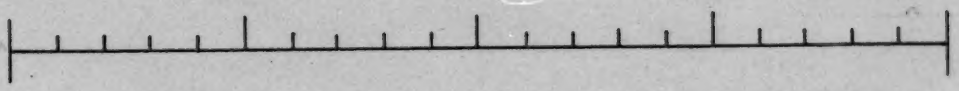
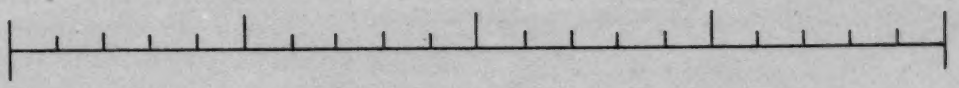
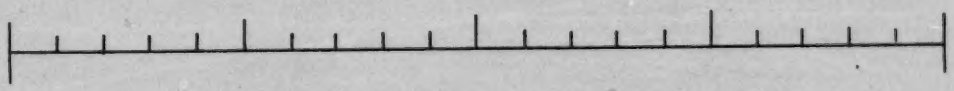
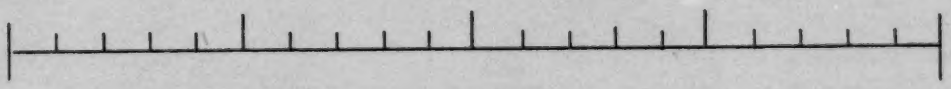
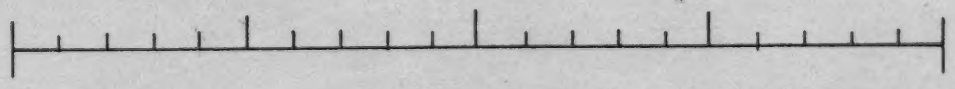
This questionnaire was developed for describing the management system or style used in a company or one of its divisions.

In completing the questionnaire, it is important that each individual answer each question as thoughtfully and frankly as possible. This is not a test; there are no right or wrong answers. The important thing is that you answer each question the way you see things or the way you feel about them.

On the line below each organizational variable (item), please place an N at the point which, in your experience, describes your organization at the present time (N = now). Treat each item as a continuous variable from the extreme at one end to that at the other.

Organizational variable					*Item no.*
1. Leadership processes used					
a. Extent to which superiors have confindence and trust in *subordinates*	Have very little confidence and trust in subordinates	Have some confidence and trust.	Quite a bit of confidence and trust.	A great deal of confidence and trust.	1
b. Extent to which superiors behave so that subordinates feel free to discuss important things about their jobs with their immediate superior	Subordinates do not feel at all free to discuss things about the job with their superior	Subordinates do not feel very free to discuss things about the job with their superior; do it guardedly	Subordinates feel rather free to discuss things about the job with their superior but may be somewhat cautious	Subordinates feel completely free to discuss things about the job with their superior and do so candidly	2
c. Extent to which immediate superior in solving job problems generally tries to get subordinates' ideas and opinions and make constructive use of them	Seldom gets ideas and opinions of subordinates in solving job problems	Sometimes get ideas and opinions of subordinates in solving job problems	Usually gets ideas and opinions and usually tries to make constructive use of them	Always gets ideas and opinions and always tries to make constructive use of them	3

Organizational variable					*Item no.*
2. Character of motivational forces					
a. Kinds of attitudes developed toward organization and its goals	Attitudes are usually hostile and counter to organization's goals	Attitudes are sometimes hostile and counter to organization's goals and are sometimes favorable to the organization's goals and support the behavior necessary to achieve them	Attitudes usually are favorable and support behavior implementing organization's goals	Attitudes are strongly favorable and provide powerful stimulation to behavior implementing organization's goals	4
3. Character of communication processes					
a. Direction of information flow	Downward	Mostly downward	Down and up	Down, up and with peers	5
b. Extent to which downward communications are accepted by subordinates	Viewed with great suspicion	Some accepted and some viewed with suspicion	Often accepted but, if not, may or may not be openly questioned	Generally accepted, but if not, openly and candidly questioned	6
c. Accuracy of upward communication via line organization	Tends to be inaccurate	Information that boss wants to hear flows; other information is restricted and filtered	Information that boss wants to hear flows; other information may be limited or cautiously given	Accurate	7
4. Character of interaction-influence process					
a. Amount and character of interaction	Little interaction and always with fear and distrust	Little interaction and usually with some condescension by superiors; fear and caution by subordinates	Moderate interaction, often with fair amount of confidence and trust	Extensive, friendly interaction with high degree of confidence and trust	8

Organizational variable					*Item no.*
b. Amount of cooperative teamwork present	Very little	Relatively little	A moderate amount	Very substantial amount throughout the organization	
					9
5. Character of decision-making process a. To what extent are decisions made by superior or by group participation and consensus	By superiors (or higher levels) with no opportunity for comment	By superior but with some opportunity for reaction by lower level	By superiors but following discussion of problem	By group participation and usually with consensus	
					10
b. To what extent are decision-makers aware of problems, particularly those at lower levels in the organization	Often are unaware or only partially aware	Aware of some, unaware of others	Moderately aware of problems	Generally quite aware of problems	
					11
c. To what extent are subordinates involved in decisions related to their work?	Not at all	Not involved in decisions; occasionally consulted	Usually consulted but ordinarily not involved in the decision-making	Are involved in all decisions related to their work	
					12
d. Are decisions made at the best level in the organization so far as the motivational consequences (i.e., does the decision-making process help to create the necessary motivations in those persons who have to carry out the decisions)	Decision-making contributes little or nothing to the motivation to implement the decision, usually yields adverse motivation	Decision-making contributes relatively little motivation	Some contribution by decision-making to motivation to implement	Substantial contribution by decision-making processes to motivation to to implement	
					13

Organizational variable					*Item no.*
6. Character of goal-setting or ordering					
a. Manner in which usually done	Orders issued	Orders issued, opportunity to comment may or may not exist	Goals are set or orders issued after discussion with subordinates of problems and planned action	Except in emergencies, goals are usually established by means of group participation	14
b. Are there forces to accept, resist, or reject goals?	Goals are overtly accepted but are covertly resisted strongly	Goals are overtly accepted but often covertly resisted to at least a moderate degree	Goals are overtly accepted but at times with some covert resistance	Goals are fully accepted both overtly and covertly	15
7. Character of control processes					
a. At what hierarchical levels in organization does major or primary concern exist with regard to the performance of the control function?	At the very top only	Primarily or largely at the top	Primarily at the top but some shared feeling of responsibility felt at middle and to a lesser extent at lower levels	Concern for performance of control functions likely to be felt throughout organization	16
b. Extent to which the review and control functions are concentrated	Highly concentrated in top management	Relatively highly concentrated, with some delegated control to middle and lower levels	Moderate downward delegation of review and control processes; lower as well as higher levels perform these tasks	Review and control done at all levels, with lower units at times imposing more rigorous reviews and tighter controls than top management	17
c. Extent to which control data (e.g., accounting, productivity, cost, etc.) are used for self-guidance or group problem-solving by managers and non-supervisory employees; or used by superiors in a punitive, policing manner	Used for policing and in punitive manner	Used for policing coupled with reward and punishment, sometimes punitively. Used somewhat for guidance but in accord with orders	Used for policing with emphasis usually on reward but with some punishment. Used for guidance in accord with orders. Some use also for self-guidance	Used for self-guidance and for coordinated problem-solving and guidance. Not used punitively	18

MANPOWER DEVELOPMENT SERVICE

CLIENT FILE CHECKLIST-APPENDUM

Organization name:_____ CLIDNM_____

Current date_____

Date involvement began_____

Date involvement terminated_____

STATUS OF CLIENT

A. Involvements

1. Number of this involvement (first digit of CLIDNM) (0 = Only)_____
2. Organization number (last 3 digits of CLIDNM)_____
3. Total number of involvements with this client_____

B. Client fees

1. Total fee charged $_____
2. Did the client pay the fee?
   - None_____1
   - Part_____2
   - All_____3
   - Does not apply____4

C. Outcome

1. Number of distinct outreach attempts_____
2. Results of first attempt_( )_( )_____
3. If no involvement resulted, why_( )_( )
4. Results of second attempt_( )_( )_____
5. If no involvement resulted, why_( )_( )
6. Results of third attempt_( )_( )_____
7. If no involvement resulted, why_( )_( )
8. Results of fourth attempt_( )_( )_____
9. If no involvement resulted, why?_( )_( )

Results Codes:

1 = Turned down by client
2 = Turned down by MDS
3 = Not followed up by client
4 = Not followed up by MDS
5 = Diagnosis involvement accepted
6 = Workshop involvement accepted
7 = Other implementation involvement accepted
8 = Diagnosis and any implementation involvement accepted
9 = Does not apply

Reasons codes: same as for Diagnosis (see next page)

D. Diagnosis

Results Codes:

1 = Not completed due to client
2 = Not completed due to MDS
3 = Involvement completed and terminated
4 = Results of involvement discussed with client and involvement terminated
5 = Diagnosis involvement followed
6 = Evaluation involvement followed
7 = Workshop resulted
8 = Other implementation resulted
9 = Does not apply

1. Number of diagnoses performed_____
2. Results of first diagnosis ( ) ( )
3. If involvement terminated, why ( ) ( )
4. Results of second diagnosis ( ) ( )
5. If involvement terminated, why ( ) ( )
6. Was a report written? (Including informal reports, e.g., working notes, memoranda)
   No_____1
   Yes, by MDS_____2
   Yes, by client____3
   Does not apply____4

Reasons Codes:

01 = Client not interested
02 = Client feels problems are inherently unsolvable
03 = Disapproval of higher management
04 = Distrust of government programs
05 = Distrust of university-related programs
06 = Distrust, hesitancy, and/or suspicion of outsiders
07 = Small firm, MDS does not see how to help
08 = Nature of organization not conducive to MDS assistance
09 = Problems outside of MDS scope
10 = MDS lack of resources
11 = Lack of MDS follow-through
12 = Lack of client follow-through
13 = Lack of client commitment
14 = Scheduling difficulties--MDS lack of time
15 = Scheduling difficulties--client lack of time
16 = Political situation
17 = Change in administration
18 = Services available through parent organization
19 = Services available from external sources
20 = Internal client resources adequate
21 = No or relatively minor problems perceived
22 = Objectives or expectations satisfied
23 = Another involvement begun w/same client
99 = Does not apply

E. Workshop

Results and Reasons Codes:
same as for Diagnosis

1. Number of workshop involvements_____
2. Results of first workshop ( ) ( )
3. If involvement terminated, why ( ) ( )
4. Results of second workshop ( ) ( )
5. If involvement terminated, why ( ) ( )

F. Other implementation

Results and Reasons Codes:
same as for Diagnosis

1. Number of other implementation involvements_____
2. Results of first implementation ( ) ( )
3. If involvement terminated, why ( ) ( )
4. Results of second implementation ( ) ( )
5. If involvement terminated, why ( ) ( )

G. Evaluation

Results Codes:

1 = Report written
2 = Non-MDS questionnaire used
3 = CCSR-E, EQ, and/or EA completed
4 = Likert (POC) administered
5 = PPIS data collected
9 = Does not apply

1. Number of evaluation attempts_____
2. Type of 1st evaluation:
   Pre_____1
   Interim_____2
   Post_____3
   Other_____4
   Does not apply____5
3. Results of first evaluation ( ) ( ) ( )
4. If involvement terminated, why ( ) ( )

C. Evaluation (cont.)

Results Codes:

1 = Report written
2 = Non-MDS questionnaire used
3 = CCSR-E, EQ, and/or EA completed
4 = Likert (FOC) administered
5 = PPIS data collected
9 = Does not apply

Reasons Codes: Same as for Diagnosis

5. Type of 2nd evaluation: Pre_____1
Interim_____2
Post_____3
Other_____4
Does not apply____5
6. Results of 2nd evaluation__( )__( )__( )__
7. If involvement terminated, why__( )__( )__
8. Type of 3rd evaluation: Pre_____1
Interim_____2
Post_____3
Other_____4
Does not apply____5
9. Results of 3rd evaluation__( )__( )__( )__
10. If involvement terminated, why__( )__( )__

H. Number of employees

1. Before MDS involvement_____
2. Date_____
3. After MDS involvement_____
4. Date_____

I. Change indices

1. Reaction_____
2. Learning_____
3. Attitude_____
4. Behavior_____
5. Results_____

J. Events affecting the organization

1. Number of negative events_____
2. Average amount of negative effect_____
3. Number of positive events_____
4. Average amount of positive effect_____

K. Other

EA 9/23/74

CLIDNM_____

MANPOWER DEVELOPMENT SERVICE

EVALUATION APPENDUM

Organization Name_____ Date_____

MDS Evaluator Name_____ Code_____

Company Official Contacted:_____ Level_____

Type of Contact:

Letter_____1
Telephone_____2
Personal_____3

1. Do you notice that MDS has had any effect upon the workers in your organization? Explain_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

A. No_____1
Yes_____2
Do not know_____3

B. Indirect_____1
Direct_____2
Do not know_____3
Does not apply_____4
Both indirect & direct_____5

C. Nature: Negative_____1
Neutral_____2
Positive_____3
Does not apply_____4

D. Amount (10 to 70)_____

E. In what way were the workers affected?

_____

_____

_____

_____

_____

Job satisfaction and/or attitude_____01
Skill_____02
Opportunity_____03
Income and benefits_____04
New positions_____05
Productivity_____06
Other_____07
Ego_____08
Does not apply_____09
More teamwork_____10

F. Number of new positions (99=no response; 98=does not apply)_____

2. Do you notice that MDS has had any effect on productivity in your organization? Explain_____

A. No_____1
Yes_____2
Do not know_____3

B. Indirect_____1
Direct_____2
Do not know_____3
Does not apply_____4
Both indirect & direct____5

C. Nature: Negative_____1
Neutral_____2
Positive_____3
Does not apply___4

D. Amount (10 to 70)_____

E. Do your organizational records reflect the change in productivity? No_____1
Yes_____2
Do not know_____3
No records_____4

3. Why do you think MDS did or did not have much effect on your organization?_____

Did_____1
Did not_____2
Both_____3
Reason given_____

4. What was your time involvement with other concerns at the time MDS was working with your organization?

Not very busy with other things_____1
Moderately busy with other things_____2
Very busy with other things_____3
4
5

5. May we use your name and/or your organization's name as a reference?

A. Your name: No_____1
Yes_____2

Org. name: No_____1
Yes_____2
Cannot say____3

THE QUESTIONS ON THE FOLLOWING PAGE WERE ASKED: Through letter_____1
Over telephone_____2
In person_____3

6. Would you have been willing to pay $_____ for the diagnostic services you received (_____man/hours at $7.50 per man/hour)?

No _____ 1
Qualified no _____ 2
Qualified yes _____ 3
Yes _____ 4
Does not apply _____ 5
Cannot say _____ 6
No response _____ 7
Other _____ 8

7. Would you have been willing to pay $_____ for the implementation services you received (_____man/hours at $15.00 per man/hour)?

No _____ 1
Qualified no _____ 2
Qualified yes _____ 3
Yes _____ 4
Does not apply _____ 5
Cannot say _____ 6
No response _____ 7
Other _____ 8

8. Would you have been willing to pay $25.00 per participant for the workshop your people attended (total participants _____; total cost $_____).

No _____ 1
Qualified no _____ 2
Qualified yes _____ 3
Yes _____ 4
Does not apply _____ 5
Cannot say _____ 6
No response _____ 7
Other _____ 8

9. Would you be willing to pay $250 per year for 20 hours of diagnosis by MDS, where extra charges would be made for additional diagnosis or implementation?

No _____ 1
Qualified no _____ 2
Qualified yes _____ 3
Yes _____ 4
Does not apply _____ 5
Cannot say _____ 6
No response _____ 7
Other _____ 8

10. How would you prefer that we bill you?_____

11. These fees would cover only about one-third of the costs to operate MDS. Do you have any suggestions as to how the additional costs could be covered?

TYPE OF CONTACT:
☐ Letter
☐ Telephone
☐ Personal

MANPOWER DEVELOPMENT SERVICE
CLIENT CONTACT AND SERVICE RECORD - OUTREACH

CCSR-O 2/11/74
☐ Marketing Contact
☐ Client Contact
CLIIDNUM_____

ORGANIZATION NAME:	MDS STAFF MEMBER(S) (List coordinator first)	DATE:

PURPOSE OF CONTACT:
☐ Initial contact
☐ Group presentation (e.g., civic, industry association, etc.)
☐ Outreach follow-up
☐ Other; specify_____

SOURCE OF CONTACT:
☐ MDS; ☐ Organization; ☐ Referral by_____

Work Code_____ Man/hours_____
_____ _____
_____ _____

COMPANY OFFICIALS CONTACTED:
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐

ENTRY LEVEL	HIGHER SUPPORT LEVELS	
1. ☐	1. ☐	1. Worker
2. ☐	2. ☐	2. Lead hand
3. ☐	3. ☐	3. First-line supervisor
4. ☐	4. ☐	4. Middle manager
5. ☐	5. ☐	5. General manager
6. ☐	6. ☐	6. Owner
7. ☐	7. ☐	7. Staff_____
8. ☐	8. ☐	8. Other_____

REACTION TO MDS:

Very unfavorable	Neither favorable nor unfavorable	Very favorable
1	2 3 4 5 6	7

Comments_____

RESULTS OF VISIT (Check those that apply and add any necessary explanation):
☐ Discussed MDS services with client _____
☐ Presented MDS brochure or other written information _____
☐ Discussed personnel problems _____
☐ Recommended MDS services _____
☐ MDS services were requested _____
☐ Designed diagnosis or implementation procedures _____
☐ Referred client to another source _____
☐ Other_____ _____

FUTURE ACTION (Check those that apply and add any necessary explanation):

By MDS	By Client		
☐	☐	No further action planned	_____
☐	☐	No further MDS involvement desired	_____
☐	☐	Contact to be made in the future	_____
☐	☐	Periodic recontact requested	_____
☐	☐	Meeting scheduled; date_____	_____
☐	☐	Further MDS involvement desired for:	_____
		☐ Diagnosis	_____
		☐ Workshop	_____
		☐ Implementation	_____
☐		Will refer client to another source	_____
☐	☐	Other_____	_____
		_____	_____

COMMENTS:

CCSR-D 2/11/74

CLIIDNUM_____

MANPOWER DEVELOPMENT SERVICE

CLIENT CONTACT AND SERVICE RECORD - DIAGNOSIS

ORGANIZATION NAME:	MDS STAFF MEMBER(S) (List coordinator first)	DATE:

PURPOSE OF CONTACT:

- ☐ Planning of diagnostic activities
- ☐ Data collection
- ☐ Analysis of data
- ☐ Development of strategy
- ☐ Other _____

_____

Work Code_____ Man/hours_____

_____ _____

_____ _____

COMPANY OFFICIALS CONTACTED:

Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐

FOCUS LEVEL	HIGHER SUPPORT LEVELS	DATA COLLECTION LEVEL(S)	
1. ☐	1. ☐	1. ☐	1. Worker
2. ☐	2. ☐	2. ☐	2. Lead hand
3. ☐	3. ☐	3. ☐	3. First-line supervisor
4. ☐	4. ☐	4. ☐	4. Middle manager
5. ☐	5. ☐	5. ☐	5. General manager
6. ☐	6. ☐	6. ☐	6. Owner
7. ☐	7. ☐	7. ☐	7. Staff_____
			_____
8. ☐	8. ☐	8. ☐	8. Other_____
			_____

Rate the client on the following dimensions: (Use "F" for Focus Level and "H" for highest Support Level)

	None	Moderate amount	Substantial amount
a. Sensitivity to human resources	1----+----2----+----3----+----4----+----5----+----6----+----7		
b. Enthusiasm for involvement with MDS	1----+----2----+----3----+----4----+----5----+----6----+----7		
c. Commitment to change if necessary	1----+----2----+----3----+----4----+----5----+----6----+----7		
d. Activity in trying out new ideas in the organization	1----+----2----+----3----+----4----+----5----+----6----+----7		
e. Openness and frankness	1----+----2----+----3----+----4----+----5----+----6----+----7		

HOW DATA WERE COLLECTED (Check those that apply and add any necessary explanations.)

- ☐ Interview _____
- ☐ Review of organizational records _____
- ☐ Questionnaire; specify _____
- ☐ Observation _____
- ☐ Other_____ _____

_____ _____

BY WHOM DATA WERE COLLECTED:

By MDS _____%
- ☐ Coordinator only
- ☐ MDS team

By client_____%
- ☐ Manager only
- ☐ Management team

TOTAL 100%

BY WHOM DIAGNOSTIC PLANNING, ANALYSIS OF DATA OR STRATEGY DEVELOPMENT WAS PERFORMED:

By MDS _____%
- ☐ Coordinator only
- ☐ MDS team
- Was Institutional Team used? ☐ No ☐ Yes

By client_____%
- ☐ Manager only
- ☐ Management team

TOTAL 100%

CLIENT ASSIGNMENTS

Assignments made previously_____

_____

Were they completed on time? ☐ No; ☐ Yes. If no, percent completion at this time_____%

Average quality of assignments completed (A,B,C,D,or E)_ _____

	Amount (1.0=none, 7.0=sub-stantial)	Quality (A,B,C,D,E)
Extra work done_____		
_____		
_____		

Examples of behavior change on the job due to MDS influence	Amount	Quality
_____		
_____		
_____		

Events which have occurred or which are expected to occur that may affect the condition of the organization

Date	Nature of Effect (1=negative, 2=neutral, 3=positive)	Event	Amount of Effect (7-point scale: 1.0=none, 4.0=moderate amount, 7.0=substantial amount)

FUTURE ACTION (Check those that apply and add any necessary explanation.)

By MDS	By Client		
☐	☐	No further MDS involvement desired	
☐	☐	Data will be collected	
☐	☐	Data will be analyzed	
☐	☐	Strategy will be determined	
☐	☐	Strategy will be implemented	
☐	☐	Report will be written	
☐	☐	Assignments to be completed; specify _____	
☐		Will or did refer client to another source; specify _____	
☐	☐	Other _____	

COMMENTS: (Including results of diagnosis, i.e., problems identified, recommendations, etc.)

PURPOSE OF CONTACT:

- ☐ Planning implementation procedures
- ☐ Implementation of strategies
- ☐ Follow-up to implementation (incl. workshop)
- ☐ Other_____

CCSR-I 2/11/74
(At least one to be completed for each client past the outreach stage)
CLIIDNUM_____

MANPOWER DEVELOPMENT SERVICE

CLIENT CONTACT AND SERVICE RECORD - IMPLEMENTATION

ORGANIZATION NAME:	MDS STAFF MEMBER(S) (List coordinator first)	DATE:

Work Code_____ Man/hours_____
_____ _____
_____ _____

COMPANY OFFICIALS CONTACTED:

Name_____
Title_____ Level ☐

Name_____
Title_____ Level ☐

Name_____
Title_____ Level ☐

Name_____
Title_____ Level ☐

Name_____
Title_____ Level ☐

FOCUS LEVEL	HIGHER SUPPORT LEVELS	IMPLEMENTATION LEVEL(S)	
1. ☐	1. ☐	1. ☐	1. Worker
2. ☐	2. ☐	2. ☐	2. Lead hand
3. ☐	3. ☐	3. ☐	3. First-line supervisor
4. ☐	4. ☐	4. ☐	4. Middle manager
5. ☐	5. ☐	5. ☐	5. General manager
6. ☐	6. ☐	6. ☐	6. Owner
7. ☐	7. ☐	7. ☐	7. Staff_____
8. ☐	8. ☐	8. ☐	8. Other_____

Rate the client on the following dimensions: (Use "F" for Focus Level, "H" for highest Support Level, and "I" for Implementation Level.)

	None	Moderate amount	Substantial amount
a. Sensitivity to human resources	1---+---2---+---3---+---4---+---5---+---6---+---7		
b. Enthusiasm for involvement with MDS	1---+---2---+---3---+---4---+---5---+---6---+---7		
c. Commitment to change if necessary	1---+---2---+---3---+---4---+---5---+---6---+---7		
d. Activity in trying out new ideas in the organization	1---+---2---+---3---+---4---+---5---+---6---+---7		
e. Openness and frankness	1---+---2---+---3---+---4---+---5---+---6---+---7		

STRATEGY IMPLEMENTED (describe strategy):_____

_____

_____

_____

_____

_____

Why was this strategy adopted (e.g., cost, availability, etc.)_____

_____

_____

_____

Does the organization have the capability to implement the strategy? ☐ No; ☐ Yes.

Explain_____

_____

_____

ROLE OF MDS IN IMPLEMENTATION (Check all those that apply and add any necessary explanation)

☐ Observer_____

☐ Liaison_____

☐ Conscience_____

☐ Catalyst_____

☐ Resource (technical assistance)_____

☐ Mirror_____

☐ Other_____

INVOLVEMENT IN IMPLEMENTATION: (Since the previous contact and including this contact)

MDS _____%
- ☐ Coordinator only
- ☐ MDS team
- Was Institutional Team used? ☐ No; ☐ Yes

Client _____%
- ☐ Manager only
- ☐ Management team

TOTAL 100%

CLIENT ASSIGNMENTS

Assignments made previously_____

_____

Were they completed on time? ☐ No; ☐ Yes. If no, percent completion at this time_____%

Average quality of assignments completed (A,B,C,D, or E)____

	Amount (1.0=none, 7.0=substantial)	Quality (A,B,C,D,E)
Extra work done_____		

Examples of behavior change on the job due to MDS influence	Amount (1.0=none, 7.0=substantial)	Quality (A,B,C,D,E)

Events which have occurred or which are expected to occur that may affect the condition of the organization:

Date	Nature of Effect (1=negative, 2=neutral, 3=positive)	Event	Amount of Effect (7-point scale: 1.0=none, 4.0=moderate amount, 7.0=substantial amount)

FUTURE ACTION (Check those that apply and add any necessary explanation.)

By MDS	By Client		
☐	☐	No further MDS involvement desired	
☐	☐	Contact to be made in the future	
☐	☐	Period recontact and assistance requested	
☐	☐	Meeting scheduled: date_____: purpose_____	
☐	☐	Evaluation of implementation; date_____	
☐	☐	Assignments to be completed; specify _____	
☐		Will or did refer client to another source; specify_____	
☐	☐	Other_____	
		_____	

COMMENTS:

CCSR-E 5/10/74

CLIDNM_____

MANPOWER DEVELOPMENT SERVICE

CLIENT CONTACT AND SERVICE RECORD - EVALUATION

ORGANIZATION NAME:	MDS STAFF MEMBER(S) (List coordinator first)	DATE:

COMPANY OFFICIALS CONTACTED:

Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐
Name_____
Title_____ Level ☐

Work Code_____ Man/hours_____
_____ _____
_____ _____

TYPE OF CONTACT:

☐ Letter ☐ Telephone ☐ Personal

Rate the client on the following dimensions:

	None	Moderate amount	Substantial amount
a. Sensitivity to human resources	1----+----2----+----3----+----4----+----5----+----6----+----7		
b. Enthusiasm for involvement with MDS	1----+----2----+----3----+----4----+----5----+----6----+----7		
c. Commitment to change if necessary	1----+----2----+----3----+----4----+----5----+----6----+----7		
d. Activity in trying out new ideas in the organization	1----+----2----+----3----+----4----+----5----+----6----+----7		
e. Openness and frankness	1----+----2----+----3----+----4----+----5----+----6----+----7		

Events which have occurred or which are expected to occur that may affect the condition of the organization:

Date	Nature of Effect (1=negative, 2=neutral, 3=positive)	Event	Amount of Effect (7-point scale: 1.0=none 4.0=moderate amount, 7.0=substantial amount)

1. What are you doing differently in your organization now which could be attributed to the influence of MDS? (Examples of behavior change on the job due to MDS influence:)	Amount (1.0=none, 7.0=substantial)	Quality (A,B,C,D,E)

2. Do you keep track of workforce measures, such as, turnover, absenteeism, grievances, etc.? ___No ___Yes

3. If yes, do your records reflect any changes which could be attributed directly or indirectly to the influence of MDS? ___No; ___Yes; ___Indirect;. ___Direct

	Nature (1=-, 2=0, 3=+)	Amount	Quality

4. Why did you decide to become involved with MDS?_____

5. Why was your involvement with MDS terminated?_____

6. What services did MDS provide for your organization? Describe briefly_____

7. Are there some things that MDS did not do with your organization that you think they should have done? ___No; ___Yes. Explain_____

8. Are there some things that MDS did in your organization that you think they should not have done? ____No; ____Yes. Explain_____

_____

_____

_____

9. Would you like to have further contact with MDS? ____No; ____Yes. Explain_____

_____

_____

_____

10. COMMENTS:

EQ 5/10/74
CMBYE: ☐ MDS
☐ Org.

CLIIDNUM_____

EVALUATION QUESTIONNAIRE

Organization Name:_____ Date:_____

1. What was your reaction to the Manpower Development Service (MDS)?

Very unfavorable			Neither favorable nor unfavorable			Very favorable
1	2	3	4	5	6	7

2. How much did you learn from your involvement with MDS which would be beneficial to you or your organization?

Nothing			A moderate amount			A substantial amount
1	2	3	4	5	6	7

3. In your opinion, was the amount of time you were involved with MDS:

____Too short; ____Just right; ____Too long

4. How much of an effect did MDS have on your organization?

None			A moderate amount			A substantial amount
1	2	3	4	5	6	7

5. What was the nature of the effect MDS had on your organization?

____Negative; ____Neutral; ____Positive

6. How much would you have been willing to pay for the services MDS rendered to your organization?

(a) After involvement with MDS was completed $_____
(b) Before involvement with MDS began $_____

7. Comments:

8. Your name:_____

CCSR-W 2/11/74

WSIDNUM_____

WORKSHOP TYPE:

- ☐ 1. Individual Organization
- ☐ 2. Industry
- ☐ 3. Geographical
- ☐ 4. Other_____

MANPOWER DEVELOPMENT SERVICE

CLIENT CONTACT AND SERVICE RECORD - WORKSHOP

MDS STAFF MEMBER(S) (List coordinator first)

Date

WORKSHOP TITLE:

Time_____ a.m. p.m.

Location_____

Session number ____ ____

Total number of sessions expected _____

ATTENDANCE AT THIS SESSION

Number of participants invited _____

Number of participants attending _____

Number who completed assignments due this session (of all those invited to attend) _____

LONG-RANGE WORKSHOP GOAL:

Work Code_____ Man/hours_____

_____ _____

_____ _____

EVALUATE:

	Not well at all			Moderately well			Very well
How well prepared was MDS for this session?	1	2	3	4	5	6	7
How well were the session objectives achieved?	1	2	3	4	5	6	7
How well did the session contribute to the long-range workshop goal?	1	2	3	4	5	6	7

INVOLVEMENT OUTSIDE OF WORKSHOP SESSIONS IN THE ORGANIZATION(S) (since previous session):

MDS _____% - -
- ☐ Coordinator only
- ☐ MDS team

Was Institutional Team used? ☐ No; ☐ Yes

Client _____% - -
- ☐ Participant only
- ☐ Management team

TOTAL 100%

BRIEF OUTLINE OF THIS SESSION:

Objective:

Agenda:

Assignment:

Handouts Presented:

FUTURE ACTION (Check those that apply and add any necessary explanation)

☐ No further MDS involvement

☐ Follow-up to this session;
specify_____

☐ Another session;
Date_____ Time_____
Objective_____
_____

☐ Other_____
_____

COMMENTS: ☐ Check here and use reverse side

WPR 2/11/74

☐ Individual Participant

☐ Aggregate of _____ Participants (number)

MANPOWER DEVELOPMENT SERVICE

WORKSHOP PARTICIPANT RECORD

CLIIDNUM_____

WSIDNUM_____

WORKSHOP TYPE:
- ☐ 1. Individual organization
- ☐ 2. Industry
- ☐ 3. Geographical
- ☐ 4. Other_____

WORKSHOP TITLE:

PARTICIPANT: (Aggregate Participant Numbers begin with 80) Participant Number

Name_____

Title_____ Level ☐

Organization_____

Address_____

Phone_____

HIGHER SUPPORT LEVELS

Session number prior to which support was obtained:

_____1. ☐	1. Worker
_____2. ☐	2. Lead hand
_____3. ☐	3. First-line supervisor
_____4. ☐	4. Middle manager
_____5. ☐	5. General manager
_____6. ☐	6. Owner
_____7. ☐	7. Staff_____
_____8. ☐	8. Other_____

FORMS FILLED OUT:

No	Yes	
☐	☐	Organization Information Questionnaire (OIQ)
☐	☐	Likert's Profile of Organizational Characteristics (POC)
☐	☐	Personnel and Performance Information Sheet (PPIS)

Rate the participant on the following dimensisons using the appropriate Session numbers. Rate the highest Support Level using an "H-___" where the blank is the Session number.

	None	Moderate amount	Substantial amount
a. Sensitivity to human resources	1----+----2----+----3----+----4----+----5----+----6----+----7		
b. Enthusiasm for involvement with MDS	1----+----2----+----3----+----4----+----5----+----6----+----7		
c. Commitment to change if necessary	1----+----2----+----3----+----4----+----5----+----6----+----7		
d. Activity in trying out new ideas in the organization	1----+----2----+----3----+----4----+----5----+----6----+----7		
e. Openness and and frankness	1----+----2----+----3----+----4----+----5----+----6----+----7		
f. Participation	1----+----2----+----3----+----4----+----5----+----6----+----7		
g. Reaction to this Session	1----+----2----+----3----+----4----+----5----+----6----+----7		

ATTENDANCE: Total number of sessions held_____

Session	1	2	3	4	5	6	7	8	9	10
Invited										
Attended										

Comments (excuses, efforts made to ensure attendance, etc.):	Date	Session

ASSIGNMENTS: Total number of assignments made to participant_____

Session	1	2	3	4	5	6	7	8	9	10
Assignment title (due this session)										
Completed on time? [Y=yes, N=no]										
If no, percent completion	%	%	%	%	%	%	%	%	%	%
Quality (A, B, C, D, E)										

Extra work done:	Amount (1.0=none, 7.0=substantial)	Quality (A,B,C,D,E)	Date	Session

Examples of behavior change on the job due to MDS influence	Amount	Quality	Date	Session

Events which have occurred or which are expected to occur which may affect the condition of the organization:

Date	Nature of Effect (1=negative, 2=neutral, 3=positive)	Event	Amount of Effect (7-point scale: 1.0=none, 4.0=moderate amount, 7.0=substantial amount)

COMMENTS:

File Currently: ☐ open
Date_____ ☐ closed
☐ All forms coded

CFC 5/10/74
CLIDNM_____

CLIENT FILE CHECKLIST

Organization Name:_____ Focus Contact:_____

HRA Coordinator:_____

OIQ	_____	CCSR-O	_____	CCSR-W	_____
PPIS	_____	CCSR-D	_____	WPR	_____
PPOC	_____	CCSR-I	_____	Other (e.g., PAQ, JDI)	
POC (Likert)	_____	CCSR-E	_____	_____	_____
Computer Client Printout		_____		_____	_____

Specific information that is missing:

Rating by HRA coordinator of impact on client: How much of an effect did MDS have on the client organization?

None — Moderate amount — Substantial amount

1----+----2----+----3----+----4----+----5----+----6----+----7

Nature of effect: ____Negative ____Neutral: ____Positive

Rating Date:
_____

WR 2/11/74

HRA Name_____

HRA Code Number_____

From_____ To_____

WEEKLY RECORD

(Not a time card--record only hours charged to the activities listed below.
Total the hours for the week on the reverse side.)

Client	Monday		Tuesday		Wednesday		Thursday		Friday	
	Work Code	Hours	Work Code	Hours	Work Code	Hours	Work Code	Hours	Work Code	Hours
Marketing (e.g., group presentations, surveys, contacts with referral sources, general public relations, etc.)										
Service Function Overhead: Planning and Administration (e.g., training, individual planning, operation-oriented meetings, etc.)										
Research Function Overhead: Project Research (e.g., completing CCSR's, writing project reports, general evaluating activity, research-oriented meetings, etc.)										

WORK CODES

10 Individual Client Organization

- 11 Outreach
- 12 Diagnosis
- 13 Implementation

20 Association of Client Organizations

- 21 Outreach
- 22 Diagnosis
- 23 Implementation

P = Preparation
T = Travel

TOTALS

Client	Work Code	Hours
	___ ___ ___	___ ___ ___
	___ ___ ___	___ ___ ___
	___ ___ ___	___ ___ ___
	___ ___ ___	___ ___ ___
	___ ___ ___	___ ___ ___
	___ ___ ___	___ ___ ___
Marketing		
Service Function Overhead		
Research Function Overhead		

APPENDIX C

REPORT TO THE UTAH MANPOWER PLANNING COUNCIL/ STATE CAMPS COMMITTEE ON THE SERVICES PROVIDED BY THE MANPOWER DEVELOPMENT SERVICE TO THE UTAH NEEDLECRAFT INDUSTRY ASSOCIATION DURING THE PERIOD FROM MARCH 1973 TO MARCH 1974

March 19, 1974

Manpower Development Service

I. INTRODUCTION

The Manpower Development Service (MDS), located at Utah State University, was organized on July 1, 1972 as a part of a national pilot demonstration project funded by the Department of Labor's Manpower Administration and Utah State University to determine the feasibility of providing manpower-related advisory and consulting services to public and private employers in the Intermountain west. The specific objectives of the project are to determine: (1) whether employers would be receptive to offers of manpower development technical advisory assistance by an "outside" agency (in this project a university-based group); (2) what kinds of technical advisory assistance might reasonably be provided; and (3) what would be the impact of such aid on various types of common employee development problems.

A key assumption of the project is that a significant barrier to the improvement of employee management practices is the lack of technical advisory assistance to help interested employers better define their needs, as well as to help them resolve those needs. A second basic assumption is that many employers would seek such assistance from a competent advisory service unit and would be willing to apply its recommendations.

The concept of "training" as used in the project takes in both the "supply" and the "demand" aspects of internal labor markets: skills training, remedial education, and human relations/communications training as they relate to the "supply" side; and job enrichment, job restructuring, workplace conditions, and human relations/communications training as they relate to the "demand" side.

The project is seeking to demonstrate whether and how a publicly sponsored mechanism, operating from a university base to provide technical advisory services, can encourage employers to develop and improve their employee management

systems to enhance the performance and job satisfaction of nonsupervisory employees.

MDS is oriented toward the identification and resolution of training and other human resource problems in organizations. However, the systemic implications of cause and effect in an organization preclude an exclusive preoccupation with manpower problems and point up a distinguishing characteristic of MDS--analysis and diagnosis. Beyond this stage, an attempt is made to act as a catalytic agent to bring a client into contact with an appropriate service agency, public or private, to deal with the problems identified and articulated by diagnosis. In this manner, a variety of problem areas--structural, financial, personnel, managerial, environmental--can be addressed with MDS serving as the coordinating and referral agency. Occasionally, when a competent service agency does not exist or when the diagnosed problem falls into an area of MDS expertise, MDS will act in an implementation role to treat problems analyzed and diagnosed at an earlier stage. In this capacity, design of training programs; management and supervisory workshops; team building and other organizational development exercises; morale, wage, and salary surveys; job, position, and task analyses; performance and appraisal schemes; and similar kinds of activities have been conducted.

Because of the nature and research objectives outlined above, MDS was instructed by the Manpower Administration during the first phases of the project not to expand the target for diagnostic services to employers who were, in a sense, secondary clients of manpower program agencies. It was felt that the primary research objectives of the project might be distorted if a special effort was made to seek out employers having manpower program involvement.

However, if employers having manpower program involvement requested MDS assistance, they were to be served on the same basis as any other clients. At a later phase of the project, this policy would be reviewed. If changes were warranted, they would be made at that time. (This review has recently been completed by a national panel of consultants convened by the Manpower Administration. Their report is expected in a few weeks.)

In addition to the overall objective of working with as wide a variety of private and public employers as possible, MDS staff members have provided extensive assistance to one industry--the Utah Needlecraft Industry Association (UNIA), which is a loosely organized trade association representing two-thirds of the 80 firms comprising the apparel industry in Utah. This report represents a brief progress report on the MDS involvement with the needlecraft industry during the past 12 months.

II. ORIGIN OF REQUEST FOR MDS ASSISTANCE

At the December 12, 1972 UMPC/CAMPS meeting where Dr. Gary Hansen, Director of MDS, introduced MDS and its services to Council and Committee members, consideration was given to a UNIA proposal that the Council petition the funding of training within the Utah needlecraft industry. The Utah needlecraft industry is a dynamic, rapidly growing industry plagued by turnover, absenteeism, low productivity, job dissatisfaction--the very indicators of the kinds of problems that had been identified previously as those MDS was created to help firms confront and alleviate. This coincidence was not lost on the Council. In a subsequent report to the UNIA regarding its request for federal funding of industry training, the Council recommended, among other things, that the Utah needlecraft industry avail itself of the

services provided by MDS. Neither was it lost on the UNIA. Independent of the UMPC/CAMPS report, the UNIA contacted MDS to explore areas of mutual interest. MDS became actively involved with the UNIA and the apparel industry in March 1973.

III. SERVICES PROVIDED TO THE UNIA

After preliminary discussions, it was mutually determined that MDS assistance was appropriate to the needs of the UNIA in at least two separate areas: (1) to help the UNIA improve its image as an attractive employer in Utah by reviewing promotional materials and practices and making recommendations for needed change, and (2) to help individual UNIA firms diagnose and analyze manpower problems specific to their organization and to assist them in finding and implementing solutions to them.

In an attempt to help improve the needlecraft image as an employer and to strengthen and broaden the UNIA as a trade association, MDS has been influential in developing and implementing the following:

(1) A more professional, appealing brochure advertising the advantages and benefits of employment in the needle trades;

(2) Coordination for recruitment and training purposes with Utah State Employment Service, Utah Technical College, and other public and private organizations offering services specific to the problems encountered among needlecraft firms;

(3) An industry-wide survey questionnaire detailing the prevailing policies regarding wage structures, benefits,

training, recruitment, and other pertinent organizational characteristics among industry members.

(4) A management/supervisory workshop based on a problem-solving framework requiring participation and interaction among managers and supervisors of 9 Salt Lake City firms.

While these UNIA-level activities were being carried out, MDS began systematically contacting and working with individual needlecraft firms. Of the 68 firms mailed MDS promotional material by the UNIA, 32 were contacted by MDS staff members, and 16 subsequently became clients of one type or another. An overwhelming majority of UNIA firms contacted by MDS were receptive to MDS assistance in confronting serious organizational deficiencies specific to their own firms. MDS has not worked individually with all of the needlecraft firms desirous of assistance for a variety of reasons: limitation of resources, need to obtain diversification of client groups to accomplish project objectives, etc.

In general, the MDS services provided to the Utah needlecraft firms have taken the following form:

(1) A diagnostic phase including such possible activities as morale and turnover questionnaires; product and work flow observation; in-plant interviewing of production and office workers, supervisors, and managers; evaluation of reward, control, and documentation systems covering aspects of the administration of personnel, financial, and other matters.

(2) An interactive phase where the results of analysis and diagnosis are discussed, evaluated, challenged, modified, and reconstructed into a strategy to confront and deal with the

problems identified at the diagnostic stage. Although personnel at all organizational levels may be contacted during this phase, the interactive process typically involves MDS staff members and the manager or director of the client organization and whatever other members of his management "team" that he identifies and wishes to involve. This is a highly critical phase inasmuch as the involvement and commitment of the manager in this process largely determines whether diagnostic results will be acted on or shelved.

(3) An implementation phase based on the diagnostic and interactive activities conducted previously. In many cases, these activities were tailored specifically to the in-house capacities and facilities of client organizations and involved such implementation activities as organizational restructuring, training and development, physical repairs and plant maintenance, work flow modification, and the development of orientation and informational materials in a variety of media. The role of MDS in these kinds of activities has been that of technical advisor and resource to the firm involved in planned change. Other firms may require and desire third-party intervention to implement needed change. In that case, MDS has acted as liaison with the Utah State Employment Service, Utah Technical College, Small Business Administration, and other public and private consultants. Where needed services are not available locally, or for other reasons (MDS training or experience, research needs, etc.), MDS

has provided specific client services, generally in the area of design of training programs, management and supervisory training and development, quasi-diagnostic activities such as wage and salary surveys, performance appraisals, audits, and other firm-specific activities.

IV. RESULTS TO DATE

The UNIA has served very well as an outreach mechanism and as a "multiplier" of MDS services. In addition, UNIA has been strengthened as a trade association and is broadening its functional base to better serve its member firms. New sources of potential labor among the disadvantaged (handicapped, minorities) have been identified and their availability advertised through the Association, as have services available through existing public service agencies (USES, SBA, Utah Technical College, etc.).

Among individual firms, a greater awareness and sensitivity to manpower-related problems have been developed, leading, we are told by many clients, to a more realistic approach to such sticky problems as turnover, absenteeism, low productivity, job dissatisfaction, low morale, waste and rework, accidents, and related concerns. From the employers' standpoint, improved performance in these areas correlates positively with soft (attitude, organizational climate, cooperativeness) and hard (productivity, profitability) production criteria. From the employees' standpoint, earnings have risen, job satisfaction increased, and more opportunities for employment made available.

In order to accurately measure the impact of MDS services on the organization and its employees, which is one of the research objectives of the MDS project, all client firms served by MDS are asked, as a condition of receiving

assistance, to provide certain data, which is used in the evaluation of the MDS service model. Through this process, many firms are being helped to design and implement appropriate data collection systems necessary for the sound management of the firm. At the same time, the data supplied to MDS is being used to provide for a systematic evaluation of the value of the services being provided.

V. ANTICIPATED FUTURE ACTION

The questionnaire designed and administered by MDS has provided the UNIA with feedback from Association members regarding the activities they would like to see UNIA assume and the direction it should take. Seminars for mechanics and skilled operators, round-table discussions for managers and supervisors, technical information sharing, and reciprocal training are some of the areas now going considered. MDS is prepared to help the UNIA develop the capacities to perform these and other functions, if a specific set of mutually agreed recommendations can be developed. The MDS role would be that of catalyst and resource to assist the UNIA to more effectively organize and use the group's own resources.

MDS has been asked to make another presentation to the UNIA group based on the problem-oriented small group activity conducted during the course of the previous MDS workshop. This will be done at the March monthly meeting of the UNIA.

The MDS staff would also like to propose the design and implementation of a career mobility model in cooperation with UNIA member firms in an attempt to address critical human resource problems of turnover, absenteeism, job dissatisfaction, and alienation by providing career opportunities for women within the needlecraft industry.

MDS has not worked exclusively with the UNIA and member firms during the past 12 months. Approximately 80 to 90 client organizations in a variety of industries have sought and received MDS assistance to date. However, the MDS involvement with the UNIA has been especially helpful because one of the basic research questions deals with the feasibility of working through trade associations such as UNIA in order to more effectively provide assistance to a greater number of firms in an industry. By such methods, MDS may be able to significantly multiply the impact of a small staff with limited resources. Consequently, in addition to considering the several possible activities that could be undertaken for the UNIA, MDS is presently posing a number of related questions about its activities in other areas: Are there other trade associations along the general lines of the UNIA appropriate for MDS to work with? Assuming there are, what is the best way to initiate contact with them, and how can MDS tailor its services to meet their needs? Should MDS be reaching out more specifically to minority and rural employers? To firms employing minorities and the disadvantaged? Can and should MDS coordinate its services with the traditional manpower programs (NAB-JOBS, WIN, NYC, JOB CORPS, etc.) provided by existing service agencies? What role should MDS have in relation to the Manpower Planning Council and the prime sponsors under the new Comprehensive Employment and Training Act legislation? These and many other concerns are under consideration and will be discussed both by the panel reviewing the project and by the MDS staff in the course of preparing the plan of work for the coming year. In the meantime, MDS will continue contact and involvement with the UNIA.

APPENDIX D

Revised 1974-75 MDS Plan of Work

I. REVISED WORK PLAN

The withdrawal of 47.44 percent of the funds budgeted for the third year of the project halfway through the fiscal year poses some rather serious problems--both of a personnel nature and in terms of the original plan of work submitted on May 10, 1974. Because of the great value of the project to the nation's manpower policy objectives, every effort will be made to minimize the impact of this unexpected and untimely withdrawal of funds. Consequently, it is proposed that the general outline of the original plan of work for 1974-75 be retained insofar as possible, with the following modifications:

A. Operational Activity. The MDS staff, which was increased in size in mid-1974 in order to obtain the additional case experience needed to provide an adequate sample for the evaluation of the impact of the project interventions upon the respective organizations and workforces of client firms, has been severely cut back as of January 1, 1974. As a result, the MDS operational team will be restricted in their outreach efforts and delivery of services. For all practical purposes, the sample of firms to be included in the evaluation phase will be that available by December 31, 1974. Work performed by the operational team with the limited resources available after that date will be specifically related to objectives II-c and II-d as outlined in the original plan of work, as modified hereinafter.

B. Evaluation. Because of the necessity of reducing the Evaluation Specialist to half-time as of January 1, 1975, the evaluation phase of the project will be slowed down considerably. The sample data now available (and computer coded) will be analyzed to the extent resources permit and the results utilized in the preparation of the final report. No additional evaluation efforts will be undertaken.

C. Fee for Service. One of the major objectives of the project during the third year was to explore the fee for services question. The first steps outlined in the 1974-75 plan of work (II-C) in identifying the most appropriate approach to the fee issue and what procedures should be adopted have already been carried out. The results of the implementation of these procedures during the period from October 1974 to the present time (and any additional experience gained by the operational team in the months ahead) will be presented in the final report.

D. Institutionalization of MDS. The placing in jeopardy of this important objective in the 1974-75 plan of work (II-D) is one of the most serious consequences of the withdrawal of funds. The efforts made by MDS staff to obtain additional financial support and sponsorship have been underway for several months. These efforts were intensified upon hearing of the funding problems faced by ORD, and this high level of activity will be continued throughout the remainder of the year. The results of these efforts will be discussed in the final report.

E. Experiences of Other Universities in Similar or Related Efforts. The data previously collected will be presented in the final report, but it is anticipated that little new data will be collected.

F. Dissemination of Results. The accomplishment of this objective--particularly the holding of a conference (which was contingent on ORD or other external financial support)--will be carried out only if sufficient resources become available. However, all other opportunities will be taken to present papers at conferences or to prepare articles for publication.

G. Internship. The internship program outlined in the 1974-75 plan of work, and which was in operation at the time of the funding cut, has been

terminated as of December 31, 1974, with the layoff of the two interns. The experience gained during the 5 months of operating this program will be reported in the final report.

II. FINAL REPORT

In addition to the activities outlined above, the writing of a final report will be undertaken as a primary objective during the remainder of the grant period. This activity will receive whatever effort is necessary to meet the requirements of the grant.

Due to the shortness of the time remaining and the straitened financial circumstances now faced by the project staff, it is proposed that no further quarterly progress reports be submitted. Instead, a draft of the final report will be submitted as soon as it is prepared--which should be about March 31, 1975. This will be followed by the submission of the final report as required under the conditions of the grant on or before August 31, 1975.

III. REVISED BUDGET

The revised budget statement that follows has been written to cover the same period of time as the original budget submitted on May 10, 1974, i.e., for the period from July 1, 1974 to June 30, 1975. Staff contracts and other contractual arrangements were made on this basis, as well as the overhead and other rates set out in the original budget. However, it is recognized that the effective dates of the final phase of the grant covered in this budget runs from September 1, 1974 to August 31, 1975.

The revised budget represents a radical reduction in the amount of resources available for staff costs--which constitute the major expenditures under the grant. In order to accommodate this reduction, the following

actions have been taken: two interns were terminated on December 31, 1974, after 5 months of service with the MDS staff; the project evaluation specialist has been reduced to one-half time beginning January 1, 1975, the contracted time of the project director and USU professional staff has been reduced by 6 man-months beginning January 1, 1975; the time of the non-faculty professional staff has been reduced from 36 to 17.4 man-months, with vigorous efforts being made to find alternative means of support for them during the remainder of the grant period; the secretarial and clerical services were reduced by 2 months; and the financial support for a graduate assistant has been reduced from 12 to 5 months.

The objectives underlying the above personnel actions were to: (a) maintain a modicum of MDS operational capability for the remainder of the grant period while all avenues for obtaining alternative financial support can be fully explored, and (b) retain the services of the key non-faculty professional staff as long as possible in order to draw upon their knowledge and experience in writing the final report.

The budget items for other direct costs have been reduced to an absolute minimum. The operating funds available in the revised budget will be augmented by whatever carryover funds are available from the previous year to allow MDS to continue the reduced level of operation for the remainder of the grant period, to provide sufficient resources to prepare the final report, and to cover the cost of printing the required number of copies for submission to ORD.

APPENDIX E

Economic and Social Characteristics of Utah

In general, Utah is quite representative of the Rocky Mountain region of which it is a part, with Colorado and Arizona more populous and industrialized, and the other states in the region less populous and industrialized

Population: In 1970 the population of Utah was 1,059,500. In the following five years the population increased to 1,207,000, an increase of 13.9 percent over 1970. Utah's rate of population growth, along with several of the other western states, is among the nation's highest. During the decade of 1960-70, Utah's urban population grew by 28 percent while rural population declined by 7 percent. Since 1970, urban population has continued its rapid growth. It is encouraging to note, however, that Utah's rural population has stabilized, and has begun a period of less rapid but stable growth. In part, the turnaround in the rural areas is a result of the recent efforts to develop the vast storehouse of energy resources located throughout the Western United States including much of rural Utah.[1]

Utah is relatively more urbanized than the nation as a whole, with more than 80 percent of the state's population living in areas classified as urban. The four counties of the Wasatch Front (Utah, Salt Lake, Davis, and Weber) which comprise only 5 percent of the state's land area, collectively account for 77 percent of the state's population.[2]

The state has a young population as indicated by the median age for 1970, 22.1 years. Traditionally, Utah has a

higher birth rate and a lower death rate than the national average. In 1973, Utah's birth rate was 24.2 per 1,000 compared with a national rate of 15.0 per 1,000. Utah's death rate was 6.6 per 1,000 and the national rate was 9.4 per 1,000.[3]

The ethnic composition of the states in the region, including Utah, differs from that of the nation with fewer number of minority groups. In 1973, the total minority population of Utah represented 6.7 percent of the population with 0.6 percent black, 1.1 percent American Indian, 4.2 percent Mexican-American and 0.7 percent Oriental.[4]

Employment: Paralleling the growth in population, the civilian labor force in Utah has grown substantially during the past decade. The total civilian labor force increased from 414.2 thousand in 1970 to 516.5 thousand in 1975. In the same period of time the number of unemployed have increased from 25.2 thousand to 38 thousand. Despite fluctuations in the national employment scene, Utah's nonagricultural job total has been one of substantial growth, especially in the early 1970's. The number of employees on nonagricultural payrolls in 1975 was 441,200, a gain of 176,800 since 1960 and an annual average growth rate of 3.5 percent. The national rate of growth for the same time period was 2.6 percent a year. Most significantly, during the 1973-75 recession total payroll jobs in Utah continued to grow, although at a slower rate, while in the nation (in 1975) they dropped by 1.8 percent.[5]

The major components of Utah's civilian labor force are shown in Table E-1.

TABLE E-1

Employees on Nonagricultural Payrolls in Utah by Major Industry Group

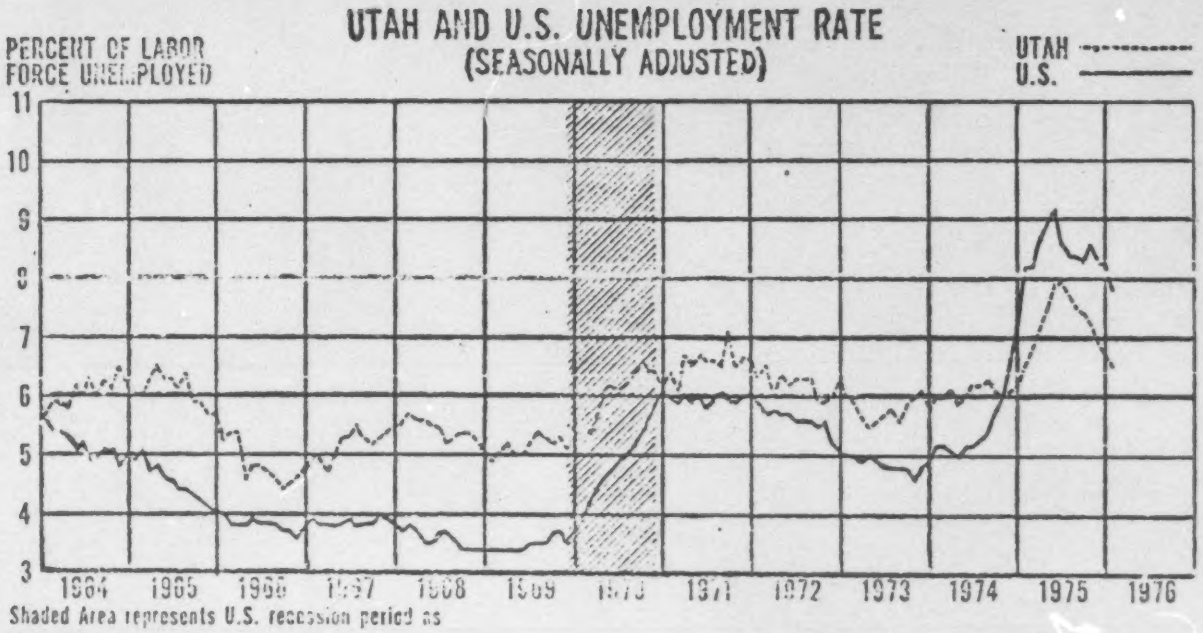
Selected years, 1960-75
(in 1,000's)

	1960	1970	1971	1972	1973	1974	1975	Projected 1980
Manufacturing	47.0	55.1	55.4	59.5	64.1	69.2	67.0	91.0
Mining	13.8	12.7	12.2	12.0	12.3	13.3	13.1	15.4
Construction	14.9	14.6	17.0	20.7	23.6	24.0	22.9	26.7
Transportation	22.2	23.2	23.6	24.2	25.2	26.8	27.1	29.8
Trade	59.6	79.9	83.3	90.7	97.7	102.2	104.1	128.1
Finance	11.3	15.0	15.6	17.2	18.6	20.0	20.2	24.1
Services	33.4	58.1	60.8	65.5	70.0	73.1	76.2	107.8
Government	62.3	100.1	102.9	105.5	105.7	107.2	110.6	134.5
TOTAL	264.4	358.6	370.9	395.4	417.6	436.9	441.2	557.4

Source: Utah Department of Employment Security

Unemployment: Unemployment rates in Utah have traditionally averaged from 0.5 to 1.0 percentage points higher than the national figures. However, beginning in 1973, the unemployment rate in Utah has dropped below the national levels and remained from 0.5 to 1.0 percentage points below them up to the present time. Chart E-1 illustrates the relationship between the Utah and U.S. unemployment rates during the past decade, and highlights the dramatic changes that have occurred beginning in 1973.[6]

CHART E-1



Shaded Area represents U.S. recession period as determined by National Bureau of Economic Research.

Source: Utah Department of Employment Security

Income: Total personal income of Utah residents increased from $3,416 million in 1970 to $5,399 million in 1974. However, when per capita personal income is considered, Utah ranks far below both national and western states averages. In 1973, for example, Utah's per capita personal income figure of $4,072 was 80.8 percent of the U.S. average of $5,041, and placed Utah 41st among the 50 states. Ten years earlier, by way of contrast, Utah's per capita personal income was 90 percent of the national average, and the state ranked 30th among all the states. Tables E-2 and E-3 illustrate the pattern of per capita personal income in Utah as compared with the United States and the Rocky Mountain States.[7]

TABLE E-2

Per Capita Personal Income in Utah and the United States

Year	Utah	U.S.	Percent Utah Is of U.S.
1963	$2,210	$2,455	90.0
1964	2,268	2,586	87.7
1965	2,374	2,765	85.9
1966	2,490	2,980	83.6
1967	2,616	3,162	82.7
1968	2,793	3,425	81.5
1969	3,997	3,687	81.3
1970	3,213	3,921	81.9
1971	3,434	4,195	81.9
1972	3,741	4,549	82.2
1973	4,072	5,041	80.8
1974	4,473	5,448	82.1

Source: Survey of Current Business

TABLE E-3

1974 Per Capita Personal Income

For The Rocky Mountain States

State	Per Capita Income	Rank
Colorado	$5,515	1
Wyoming	5,404	2
Arizona	5,127	3
Montana	4,956	4
Idaho	4,918	5
UTAH	4,473	6
New Mexico	4,137	7

Source: Survey of Current Business

There are several reasons for the low per capita personal income in Utah. First, the state has households with relative larger sizes, and the state generally has a somewhat smaller percentage of its total population in the labor force than does the nation as a whole. A third factor is the relatively low level in industrialization.

Manufacturing: With only 67,000 workers in 1975, Utah's manufacturing sector, along with most of the other states in the region, has lagged somewhat behind the nation for many years. However, there have been substantial growth in this sector during the past decade. From 1960 to 1974, Utah's manufacturing employment increased by an average of 2.8 percent,

whereas the national rate was 1.3 percent. However, because of the recent recession, manufacturing employment declined in 1975 by 3.3 percent in Utah and by 8.4 percent in the nation.[8]

Table E-4 indicates the geographic dispersion of Utah's manufacturing firms. The extent to which the state's industrial firms are concentrated in the metropolitan Wasatch Front area (which contains 77 percent of the states population) is shown in Table E-5.

TABLE E-4

Distribution of Manufacturing Firms in Utah

by County, selected years

County	1960	1965	1970	1973	1974
Beaver	5	4	7	8	7
Box Elder	25	29	34	34	39
Cache	48	48	54	64	67
Carbon	21	21	14	18	25
Daggett	4	0	0	0	0
Davis	38	57	80	82	95
Duchesne	13	9	10	16	20
Emery	6	5	5	6	7
Garfield	10	11	10	9	9
Grand	7	7	6	8	6
Iron	20	22	21	26	22
Juab	6	7	7	10	8
Kane	4	3	3	3	4
Millard	10	9	15	17	18
Morgan	4	4	6	6	7
Piute	2	0	1	2	3
Rich	3	2	1	1	1
Salt Lake	547	582	723	798	852
San Juan	14	8	10	8	8
Sanpete	27	23	28	35	30
Sevier	23	20	25	24	24
Summit	15	15	13	19	17
Tooele	12	12	15	19	18
Uintah	21	14	18	20	22
Utah	112	113	159	171	199
Wasatch	9	5	6	7	9
Washington	11	5	16	21	26
Wayne	5	4	3	4	4
Weber	122	111	113	128	139
STATE TOTAL	1,144	1,150	1,403	1,564	1,686

Source: Directory of Utah Manufacturers, 1975-76

TABLE E-5

Concentration of Utah Industrial Firms

Year	Total Utah Mfg. Firms	Total Wasatch Front Mfg. Firms	% of Wasatch Front Mfg. Firms to Total Mfg. Firms
1960	1,144	819	71.6%
1965	1,150	863	75.0%
1970	1,403	1,075	76.6%
1973	1,564	1,179	75.4%
1974	1,686	1,285	76.2%

Source: Directory of Utah Manufacturers, 1975-76

While the heavy concentration of industrial growth along the Wasatch Front is not considered to be an economic problem, it does point up the need to assist Utah's remaining counties to increase their participation in the industrialization process.

Footnotes

[1]John E. Brockert, "County Population Estimates for Utah, July 1975," Utah Bureau of Economic and Business Review Vol. 35 (December 1975) pp. 1-5.

[2]Frank C. Hackman, "Population Projections for Wasatch Front Counties," Utah Bureau of Economic and Business Review Vol. 35 (November 1975) pp. 1-9.

[3]Iver S. Bradley and Lawrence Naliers, "Demographic Patterns of the Utah Population," Utah Economic and Business Review Vol. 33 (April 1973) pp. 1-5.

[4]Ibid.

[5]Employment Newsletter, Utah Department of Employment Security, January 1976.

[6]Ibid.

[7]John T. Dunlop, "Utah Personal Income, 1970-73," Utah Economic and Business Review Vol. 35 (March - April 1975) pp. 1-5.

[8]Employment Newsletter, op. cit.

APPENDIX F

CASE STUDY #1

This case study deals with a consulting relationship MDS had with a trailer manufacturing firm that had a work force of approximately 350 employees.

The firm, located in a small town in a sparsely populated rural area, was having serious organizational and employee problems that resulted in high turnover and low employee moral.

The firm's personnel director became aware of the services provided by MDS through information given to him by a representative of the Utah Department of Employment Security. A phone call was made to MDS by the personnel director requesting MDS help in the solving of personnel problems at the plant.

MDS decided it would be beneficial to make a preliminary visit to the trailer manufacturing plant to get an idea of what the situation was.

In the initial visit, MDS visited with the personnel director, and one of the plant managers.

The President of the XYZ Trailer Co. was not aware of the MDS intervention. It was decided on the next trip down that MDS would visit with him to see if he would be supportive of MDS help.

The visit with the president was the critical step to future MDS involvement. Apparently the president had had contact with consultant types before and was very displeased with their recommendations. As a result, he was initially rather cold with MDS; but after a lengthy conversation, he

felt less threatened and gave MDS the go-ahead to conduct preassessment activities with employees of the plant.

MDS personally interviewed a representative sample of the XYZ force as designated by the personnel director. Steps were taken to talk with employees who represented various feelings of the XYZ employees.

The information was then analyzed by MDS staff in order to pick up any trends in the types of problems that were being expressed by XYZ personnel.

MDS conclusions based on employee interviewing indicated that employees were dissatisfied with the following situations existing at XYZ:

1. The employees felt that pay raises were not based on performance and productivity. They found members of their work force receiving raises who were not working as hard as other employees.
2. The employees did not feel they were being paid a good enough wage. This was particularly mentioned by the long-term employees.
3. Employees felt that the benefits provided by the company, though improved, were not yet at a level that was acceptable to them.
4. Most employees did not feel they were being motivated as they should be. They felt they were rarely complimented for work well done and often criticized.
5. Employes who had worked for XYZ Trailer for a considerable period ot time felt some resentment towards the lenient rehiring policy.

6. A number of middle management personnel were upset because top management was overlooking them and recruiting men from outside XYZ Trailer to fill management positions of greater responsibility. They felt an effort should have been made to train them for such positions.
7. There was no security or future in staying at XYZ. Management had not taken steps to make working at XYZ a life-time career opportunity.

The above feedback in expanded form was presented to Mr. Roshem and other selected management personnel of XYZ Trailer. After receiving the employee feedback, it was decided by the president that MDS should develop a number of suggestions as to what could be done to alleviate or lessen the severity of the problems that had been identified. As a result, additional interviewing was conducted to verify a number of conclusions that had been previously reached. A second recommendation report was formulated and presented to XYZ management. As mentioned, the second report addressed the various problems that had been identified by MDS and indicated recommendations for action that could be taken to remedy the current circumstances.

The actual recommendations are too lengthy to be given in their entirety in this report. In general, however, MDS saw needs for change in the following areas:

1. Organization - MDS recommended that a number of changes could be made in the plant's organization framework. A step by step process was outlined, a new organizational chart was developed reflecting recommended changes,

and personnel reassignments were presented for consideration by XYZ's management.

2. Management - In the past middle management had not been actively included in the decision-making process. MDS recommended that particular steps be taken to include middle management and develop more of a management team effort at XYZ.
3. Training and Management Development - MDS identified three areas where training and development were necessary for XYZ personnel: In-House management development, first-line supervisory training, and production worker training. Each area was considered individually accompanied with MDS recommendations for action that would enhance the area all-productivity of all three organizational functions.
4. Personnel Policies and Practices - So as to improve the role of the personnel director and his responsibilities as well as solve a number of problems identified by employee interviews, MDS made recommendations affecting the rehire policy, hiring of part-time workers, the role of the personnel director with respect to the line managers, assistance in locating housing for new employees, development of a systematic orientation process, the creation of an handbook, and the compilation of a company policies and procedures manual for all management personnel.
5. Salary and Benefits - Because of the inequities that were apparent in the salary benefits area, MDS made a

series of recommendations designed to formulate a just set of procedures designed to insure that all employees were treated fairly and objectively.

6. Rumors - During the interviewing process, MDS discovered that rumors and all other forms of poor communication were evident at XYZ. For this reason, MDS suggested that information meetings be conducted, a company newsletter be published, and that managers and supervisors support their superiors in front of their employees and work out management differences in appropriate meetings with their superiors.

7. Motivation of Employees - In general, employees felt they were more often criticized for less than acceptable work and hardly ever complimented for work well done. MDS recommended that particular steps be taken to give employees the recognition they deserved. An employee-of-the-month program was encouraged along with other motivating ideas.

8. Supplies - It was found that employee morale suffered when supplies were not on hand when needed. MDS suggested that top management investigate this problem further and take the steps necessary to provide employees with the materials they needed to do their jobs.

As with the first report, MDS reviewed with the company president the findings and recommendations it had made in the second report. MDS recommendations were favorably accepted and a number immediately implemented by the company including:

a. The implementation of suggested organizational changes,

b. The development of a supervisory and management training, program with MDS developmental and implementation assistance,

c. The redefinition of the role of the personnel director and his important role in the organization,

d. The formalization of company policy procedures,

MDS felt that the involvement with XYZ demonstrates what can be done within an organization by following the MDS process of outreach, diagnosis, and implementation. The key element of MDS success in this case was winning the confidence of the company president who was openly skeptical of what MDS could do when first introduced. This confidence was made possible by MDS taking a listening approach with the president and couching its feedback and recommendations in terms that the president could understand and identify with.

CASE STUDY - 2

Entry

In September 1974, a human resource analyst for Manpower Development Service (MDS) located at Utah State University approached the management of Valley Implement and Hardware Supply Company. During the initial contact, MDS met with Frank Schmidt, the president and general manager, and explored the services of MDS with him. MDS explained its purpose and that the service would be gratis through the final report, except for financing material and secretarial time during the data gathering stage. Frank was interested, but hesitant and asked MDS to call back in a week after he had explored the services offered with other management personnel. MDS called back after a week and, finding the client interested, made an appointment to explore expectations and possibly develop a data gathering strategy.

During the next meeting, Frank discussed the general situation at Valley with MDS, but was adverse to sharing his knowledge of the specifics. He attributed most of their problems to "conflicts of interest among management" and "weak finances." He then proceeded to give a history of the company and the process by which the company had become employee owned. He states that he did not want to have much contact with MDS until a proper analysis of the system had been made. He continued by saying that he wanted the analysis to be "impartial" and that he did not want to "prejudice" the views of the consultant. The head secretary, Kathleen, was then ushered in and introduced to

MDS. She was designated as the coordinator of the data gathering effort and told to help the analyst get access to any record or contact any person that he wanted to interview. As the analyst stepped out of the general manager's office, he was in a state of bewilderment. He had the full support of the general manager and everyone would know it, but he really had no rapport with him. The consultant had the notion that to be an effective consultant it would be necessary to develop a sound, trusting relationship with the client.

Diagnosis

After developing some rapport with the head secretary by discussing her views of the situation at Valley, MDS decided to have the secretary set up interview appointments with all department heads and key salesmen. It was decided that when there were no appointments MDS would mingle with office and warehouse personnel and discuss employee concerns and attitudes toward company functioning. After completing this interviewing process, two diagnostic instruments were selected to more completely analyze the situation at Valley. One questionnaire, called the Organizational Effectiveness Survey, was used to diagnose how clients of an organization perceived its effectiveness. The other, the Organizational Analysis Survey, was used for diagnosing the internal atmosphere of an organization (both these instruments were developed by William G. Dyer and Gene W. Dalton of Brigham Young University).

After concluding the analysis of the data, MDS thought about the climate or atmosphere of the organization. MDS

described it as "very hostile." Many employees had reported "yelling" between supervisors and employees and among employees. One of the new employees reported, "I am discouraged because no one seems to want to help me clarify what I am to do." Another older employee seemed to get irritated rather easily if she though someone was "messing" in her "affairs." In short, as one worker tersely put it, "I think that there are too many personality conflicts out of control." Just prior to the analyst's visits to the company, several key salesmen and office workers had left the company. Although these were not people in top management, some had noticed a loss of effectiveness in the office. Upon closer questioning of management personnel, many had considered leaving the organization, but hesitated to do so because of personal monetary investment or through hope that the "true potental" of the business would surface. Some of the older managers had seriously considered early retirement, but had rejected the idea mainly because they felt that their age would be prohibitive in securing other employment.

In approaching a strategy for presenting the analysis to management, MDS began to weigh the data and the relationships that had been formed. MDS began to feel some consternation about feeding the data back. Who should be approached first? How much information should be given and in what form should it be fed back?

Feedback and Strategy Development

In approaching the first feedback session, MDS decided to meet with the general manager to see how he would react

to the data and how committed he would be to follow through. In this preliminary session, MDS tried to be as frank as possible to see how disposed the general manager would be to receiving feedback about the organization and his own managerial weaknesses. After they discussed MDS' candid approach and the reasons for it, the general manager was committed "to see this thing through." They agreed that it would be necessary to meet with the board of directors and "lay it on the line."

In formulating a strategy for the first feedback session, MDS had two aims that he felt would be keys to having a successful meeting. First, MDS felt that the data should be in a form that would be easily understood and yet fit the format created by the questionnaires. MDS, therefore, used the same categories as the questionnaire and developed perspicuous themes associated with each one. These themes came mostly from the interview data. The document created from this process became the focal point during the first session. Second, MDS realized the actual problem solving would probably not take place during the first meeting and, accordingly, planned just to explore the data. Time would be necessary to clarify, assimilate and finally accept the data.

During the first part of the session, MDS felt that the anxieties were well founded, since the board members were somewhat reticent to ask clarifying questions. MDS then took some time to clarify the role and explain more about the computer printouts containing the questionnaire data. This seemed to help the atmosphere. As the meeting went on, the groups seemed to open up as interest grew. MDS felt good about the meeting

as it reached the end of the issues that had been prepared to explore. After MDS had fielded a few more questions, it was asked, "Where do we go from here?" With this timely question on the table, there was a lull in the meeting.

After some deliberation, MDS felt it important to give an opinion about and indication of the data.

> I feel that Valley has lot of problems in the human area, but the majority of these problems can be traced to you in top management. I think that this is the problem that ought to be focused on; all others seem peripheral in comparison to the relationships among yourselves.

MDS then admitted to not knowing how to solve this problem, but proposed that some time be spent in brainstorming and discussing alternatives to solving it. Further groundwork was laid for this discussion by talking directly about the general manager's role.

> As you noted, there was a lot of negative comments about the way that the general manager is fulfilling his role here. It would seem to me that a good place to begin a change would be around his function. If a change of this type is not possible, then the relationship patterns among you will have to be altered.

With a gesture of acceptance to this comment by the general manager, the discussion opened up. The flow of conversation focused on four alternatives that might be classified as follows: (1) changing the general manager's function, (2) employing a role clarification technique, (3) hiring a new professional general manager, and (4) leaving things the way they were. MDS only participated during the discussion of the role clarification technique, however, copious notes were taken.

The meeting lasted four hours and, although it had a slow beginning, it apparently ended being quite well accepted and owner-

ship was manifest. MDS felt that the success of the meeting lay in the preparation, the relationships that had been developed with those in the meeting during the interviews, and especially the committment of the general manager to "see this thing through."

Re-evaluation

After a lag in the contract, MDS was invited back to the company to help revive the impetus for positive change which had slowed after initial testing. MDS undertook a re-evaluation of the data that had been gathered. MDS took a look at the organization, its structure and environment using a more theoretical approach.

MDS first went through the literature to find research on organizations similar to Valley and the hardware industry. This search was fruitless, and efforts were turned to studies on industries which had comparable environments to the hardware industry. The work that was found particularly pertinent was done by Paul R. Lawrence and Jay W. Lorsch of Harvard University.

Two key concepts in their research were "differentiation" and "integration." Differentiation referred to the cognitive and emotional differences between departments or units that interfaced with each other in the same organization. Integration was defined as "the quality of the state of collaboration that exists among departments that are required to achieve unit of effort by the demands of the environment."[1] An industry with a stable environment, such as the plastics industry, would require high differentiation and high integration to meet the demands of an uncertain environment.

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[1]Paul R. Lawrence and Jay W. Lorsch, Organization and Environment (Homewood, Ill.: Irwin, 1969) p.11.

As MDS thought about Valley, he could see that, historically, its environment had been quite stable, but over the more recent decades had grown increasingly complex. In comparing the industry of Valley to those in the Lawrence and Lorsch study, MDS felt that the environment of the container industry was the most applicable. They wrote:

> In the container industry where uncertainties were fewer and the dominant issues were delivery and quality, the required integration centered on more routine problems and was less frequent and less complicated. This, plus the fact that scheduling decisions affected all plant and sales locations, suggests that the knowledge required for interdepartmental decisions must be centrally processed and could be effectively handled by fewer managers. Since the positional influence for such decisions rested at the top of the organization hierarchy, it would seem most efficient to collect the required knowledge at this level so that conflicts could be resolved and integration achieved by the upper managers, who had the positional influence and could acquire all the knowledge to do so.[2]

Thus, in a stable environment the demands for integration are mostly handled by a few managers at the top. The original Valley organization chart (Figure 1) portrays an organization in which integration was accomplished mainly through hierarchical channels. This chart had been developed in the early 1950's and functioned quite well then. However, in 20 years the number of products had more than doubled and new billing, accounting, and inventory control systems have been developed, thus increasing the uncertainity of their environment. MDS felt that the informal changes in the reporting relationships at Valley (see Figure 2) had come as a natural adjustment to handle the increased differentiation and integration as dictated by the changes in the en-

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[2] Ibid. p. 97.

vironment. More positions had been required in top management to make decisions about more problems. However, the consultant did not feel that the adjustment had been complete. The Valley managers simply had not been able to adapt to the demands of higher integration. They had always depended on positional power to resolve conflicts between units. They just did not have the interpersonal skills nor the commitment to cope with the increased interaction required. In fact, it appeared that they had digressed since fewer meetings were held than in the past and some managers had built defenses to protect themselves against the demands of interaction. While it was obvious that the environment had changed, MDS doubted that the drastic changes in organizational structure had been warranted.

To confirm the analysis, MDS decided to contact other firms in the industry in the same geographical area. In talking with two competitors, it was found that they had gone through similar changes in their hierarchy over the years. They had developed formal charts representing a more decentralized organization than their original hierarchical designs, similar to the informal adaptions at Valley (See Figure 2). However, MDS noted that these organizations were larger organizations than Valley, but had a smaller top management team. For instance, there was only one sales manager and one marketing manager in these organizations. MDS theorized that this fact could be accounted for by the tacit pressures on the general manager to involve high percentage stockholders in management activities. The general manager had acknolwedged this pressure previously. MDS concluded that Valley had a top management team that was too cumbersome for the size

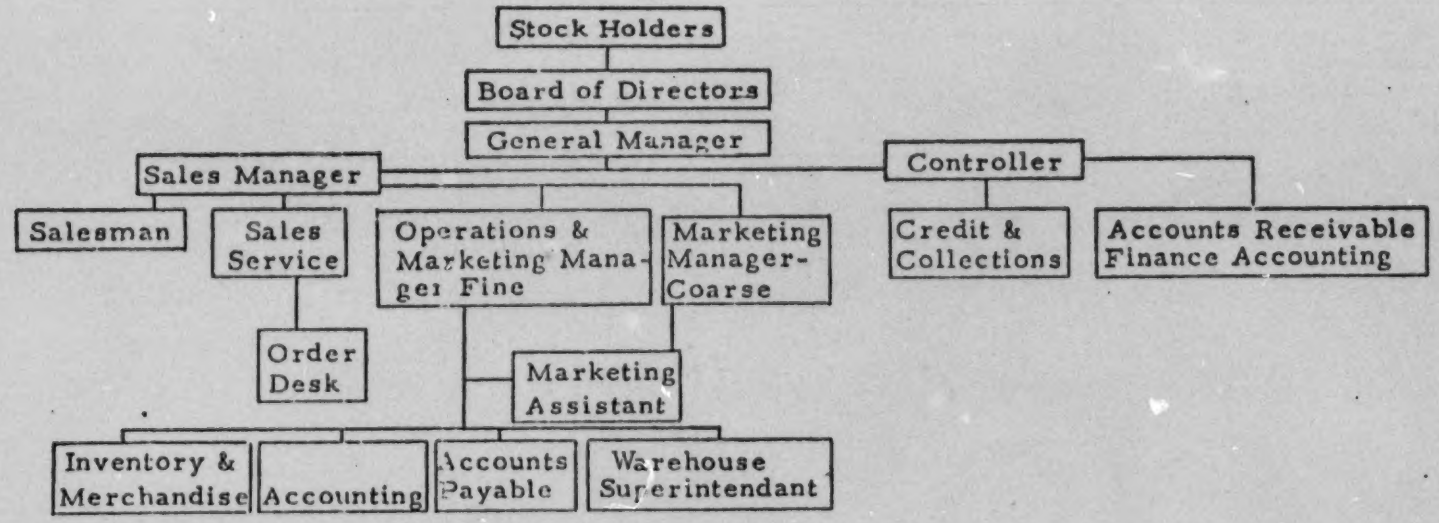

Figure 1. Organizational structure after the divestiture.

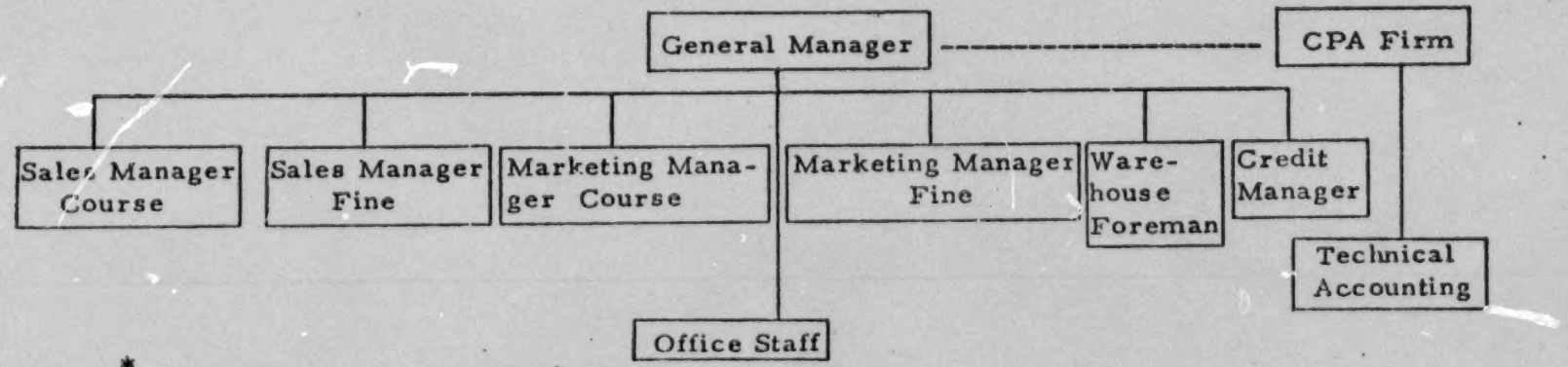

Figure 2*. Informal organizational adaptation

of their operation. Thus, with more managers than necessary and with less commitment and skill to meet the demands for interaction, defensiveness and hostility had been adopted to cope with fellow employees and increasing complexity.

The new handles MDS had on the situation only served to strengthen the conviction that the central problem lay in the relationship patterns among top management. With this belief, MDS was anxious to present the analysis to the general manager. In the meantime, MDS continued to search for a tool to help the relationship problem.

Implementation

In approaching the general manager with the new analysis of the situation, MDS felt that the manager would be interested, but to cure the cause of the problem would be a real test of his commitment "to see this thing through." In the first meeting, Frank spoke with enthusiasm about a successful experience he had had in implementing one of the consultant's previous recommendations. It dealt with a division of authority in the warehouse. He had selected a new supervisor over the receiving area as suggested in an earlier meeting. In carrying out this delegation, he explained to the worker that he wanted him to take full responsibility for storing incoming inventories. He further explained that he would not interfere as in the past. During the weeks that followed, the general manager kept his commitment. He reported to the consultant:

> The warehouse is looking better than it has for five years. I have received compliments from many in the office. I really haven't done anything except to experiment with a new leadership pattern.

In the time that had lapsed since the end of the initial diagnostic effort he had time to evaluate the success of this experiment. His successful implementation of the recommended change increased the credibility of the consultant.

However, when MDS presented the re-evaluation to the general manager, it was obvious that a resolution of the real problems at Valley could not be solved with a simple solution such as the one used in the warehouse. The general manager would have to think through what he would do. After several meetings, it was decided that the general manager would develop a proposal for the board of directors. It will not be necessary to discuss this proposal in detail--just to say that it included some formal restructuring. Couched in this proposal would be an attempt by MDS to begin realignment of the hostility between the general manager and his department heads.

The preparation for this special board meeting had been extensive. The board plus all other department heads had been invited to attend. MDS had spent a lot of time thinking through his phase of the meeting. He was convinced that the structure he would give to the meeting would facilitate the discussion about the general manager's restructuring proposal. When it came time for the meeting, it seemed as though it had been programmed to fail. Before the meeting started, the consultant learned that Frank had added three "important items of business" to the agenda and, there would therefore, not be as much time to spend on the management analysis. MDS had prepared for the meeting, expecting that they were convened for one purpose--to discuss the restructuring of the top management team. It was obvious that the general

manager did not understand the type of commitment that would be involved to pursue the proposed course. The "more pressing matters" the general manager had added to the agenda had obviated a major portion of the consultant's presentation. As the general manager introduced his proposal, resistance to it started immediately. The more the general manager talked, the more the group resisted. Eventually, the emotions became heated and the exchange became too much for the group to handle. It seemed that they had a circuit breaker that cut off the discussion if the conflicting opinions got too heated. This part of the meeting was cut short unitl things had "cooled down." At this point, all non-board members (including MDS) were excused from the meeting as the board alone focused on the other items on the agenda.

MDS met one more time with the general manager and discussed the outcome of the meeting. The general manager informed MDS that they would not proceed until things had "cooled down." At the end of this meeting MDS felt that this would probably be the end of the contract.

Observations on Results

Although the general manager's commitment at first "to see this thing through" was unusually supportive of the diagnostic effort, it waned when any type of implementation activity was pushed. The first phase of the diagnosis was well accepted and substantial progress was made when the board explored the alternatives for improving the top management situation at Valley. These alternatives were not followed up by the general manager and were eventually dropped altogether. However, the general manager did follow through on a lesser recommendation of MDS which

helped to substantially improve the situation in the warehouse. With the top management problem still seething, the consultant reevaluated the situation at Valley. He increased his knowledge on the cause of the situation through a more theoretical approach. With this new analysis he tried to help the general manager develop his top management team into a more proficient and cohesive group. It is useless to place blame on anyone for the failure of this effort, but most important to note some observations about the process. Entry into the company was very smooth, but after both phases of the extensive diagnosis, no substantial change occurred except in a non-threatening area, the warehouse. It seemed that the change effort was seriously hampered when any attempt was made to help improve the poor functioning top management team, the major cause of the hostile atmosphere at Valley. The change process was simply incomplete. No substantial change occurred because the contract was essentially stymied after the diagnosis phase. After two diagnostic attempts to help get a significant change effort started, the implementation phase was almost negligible among the top management team.

CASE STUDY #3

Baker and Brothers, Inc.

(Firm's true identity has been disguised)

Baker and Brothers, Inc., a manufacturing plant employing approximately 150 workers, through a previous contract with MDS indicated a need and desire to establish better working relationships among management, supervisors, and workers. Baker and MDS mutually decided upon a workshop to address the goals of: (1) strengthening the job of the supervisor, (2) strengthening the supervisor himself, (3) building closer and better working relationships among the members of the management team, (4) developing a greater commitment to its employees on the part of the firm, and to the firm on the part of the employees, and (5) building better communications. A six-session workshop was developed and implemented to address these issues. Following the workshop, Baker and Brothers, with assistance from MDS, developed a questionnaire to evaluate the workshop (Table 3). The general rating given the workshop was very good to excellent by 9 of the 11 workshop participants. Topics discussed, speakers and facilitators, relevancy, and related areas were rated equally high. Ten of the 11 felt they were doing some or many things differently as a result of the workshop, and 9 of 11 saw improvement in work-related behavior and relationships. When asked what they were doing differently (Question 8), participants responded with the following comments:

- There are better communications now, upward and downward. Orders are made clear; people are listening better. (5 responses)

TABLE 3

QUESTIONNAIRE

MANPOWER DEVELOPMENT TRAINING SESSION

Baker and Brothers, Inc.

	Excellent	Very Good	Good	Fair	Poor
1. What would be your general rating of the course?	1 (9%)	8 (73%)	2 (18%)		
2. How would you rate the manner (skill) of presentation of the speakers?	2 (18%)	8 (73%)	1 (9%)		
3. How well did the speakers use their audio visual equipment?	4 (36%)	4 (36%)	2 (18%)	1 (9%)	
4. What would be your rating of the value to you of the topics discussed?	1 (9%)	7 (64%)	3 (27%)		
5. How would you rate your interest in the topics discussed?	4 (40%)	5 (50%)	1 (10%)		

6. How would you rate the workshop on theory versus practical?

- Too much theory - 1 (9%)
- OK - 10 (91%)
- Too much practical - 0 (0%)

7. List three specific things you learned from the workshop.

8. Are you doing things differently now because of the workshop?

- Many things different - 1 (9%)
- Some things different - 9 (82%)
- Nothing different - 1 (9%)

Please list briefly some examples of the above.

9. Have you noticed any improved behavior in the workers due to the fact that their supervisors attended the workshop?

- Much improvement - 0 (0%)
- Some improvement - 9 (82%)
- No improvement - 2 (18%)

Please list briefly some examples of the above.

Please write below any additional comments on the workshops.

- We are working together better now; there is more teamwork. (4 responses)
- I recognize problems more clearly now and know how to begin solving them. (4 responses)
- Foremen do their own hiring now. (1 response)
- There is more working foremen involvement in decision-making. (1 response)
- I set immediate and long-range goals. (1 response)

Workers had benefited directly and indirectly by changes in their supervisors. Participants commented that:

- The men feel more free to discuss problems; there are better communications with supervisors. (3 responses)
- Their attitude and morale seem better. (3 responses)
- There is more teamwork in problem solving. (2 responses)
- They accept more responsibility. (1 response)
- The men are happier. (1 response)
- We are putting employee ideas into practice. (1 response)

A most beneficial development at Baker and Brothers is the assumption of MDS functions by one of their staff members--an internal change agent and consultant, if you will. It was this individual who designed and administered the evaluation questionnaire (Table 3), and he is currently working in conjunction with MDS consultants in developing follow-up workshops for all levels of the firm's employees.

CASE STUDY #4

Lady's Apparel, Inc.

(Firm's true identity has been disguised)

Lady's Apparel, Inc., is a women's apparel manufacturer employing approximately 200 people, mostly women power sewing machine operators. Lady's Apparel was referred to MDS as a result of a presentation to and cooperative action with the industry trade association, Utah Needlecraft Industry Association (UNIA). MDS' subsequent involvement with Lady's Apparel over a period of a little more than one year is sketched below:

a. Diagnosis. Interview and observation data provided the foundation for discussions and interaction with two of Lady's Apparel's managers (production and assistant production manager) leading to fairly extensive structural and relationship changes, an alternative method for recruiting and selecting machine operators (a change which has substantially reduced turnover), an internal "bid" system for promotions and job vacancies, a focus on new training and orientation methods, and a commitment on the part of the production manager to delegate more responsibility and authority to her supervisors.

b. UNIA Geographic Workshop. Two Lady's Apparel assistant managers attended a problem-solving workshop for UNIA members. Eleven firms sent 23 managers and supervisors to a six-session workshop addressing the problem-solving process, team-building, communications and listening skills, and essentially the same format as the Baker and Brothers' workshop discussed earlier. The two assistant managers from Lady's Apparel were attending out of interest in the topics and learning process and also to

prepare themselves to help design and implement an in-house workshop for Lady's Apparel supervisors.

c. Lady's Apparel In-House Workshop. Twenty-five Lady's Apparel supervisors attended an eight-session workshop jointly designed and implemented by MDS and Lady's Apparel (one of the assistant managers, noted above, has assumed an internal consultant role and has been instrumental in developing and administering questionnaires, surveys, training programs, and the like). The objectives of this workshop were to: (1) strengthen the supervisors and their positions, (2) develop cohesive links among worker, supervisor, and manager, and (3) develop specific skills of leadership, initiative, problem-solving and decision-making, communication, and cooperation. All 25 supervisor reacted favorably to very favorably to the workshop and indicated transfer from the workshop to the workplace had indeed taken place. The following are some of the comments received:

- "I try harder now to get along with people I disagree with. I try to see their point of view."
- "My manager delegates more responsibility now; she permits growth to take place."
- Morale, people's attitudes have improved enormously."
- "We're listened to now, and I think we also listen to each other and to the people we train and supervise."
- "We've been given the support and authority we need to carry out duties."
- "I'm more aware of problems, conditions, issues, people's needs now."
- "We work together, coordinate together much better."

d. Diagnosis. While evaluating the in-house workshop, MDS consultants identified a particularly critical problem

involving the distribution of work materials and conflicts among the people responsible for that function. Lady's Apparel's production manager asked MDS to make a thorough diagnosis of the situation and to make specific recommendations for its remediation. While this involvement is in an on-going state, it appears that some significant changes in structure, job design, and work responsibility will definitely result from this consulting activity.

Lady's Apparel is a significant client for MDS in a number of respects. One, is the number and variety of activities conducted and services provided them. Another, is the length of time in contact with them in one form or another. Still another, and most significant, is the real and apparently permanent change that has resulted from diagnostic and implementation activities--structural change; delegations of authority and responsibility; hiring, firing, promotion, and training practices; work rule revision, plant-wide morale and attitude change--measured on Likert's Profile of Organizational Characteristics and moving steadily from Systems One and Two to Systems Three and Four, a more open, participative work climate; assumption of problem-solving and decision-making by operators and supervisors at all levels in the organization. Equally important are bottom-line results on Lady's Apparel: A substantial increase in productivity, a 30% increase in profits, and a 30% increase in employment--more than 75 new workers have been hired in the past two months alone. Many of these results are due to the dynamic nature of the industry and the firm. Many, it is felt, are due to the joint MDS/Lady's Apparel development efforts.

APPENDIX G

Members of MDS Advisory Council

Wiley Beavers, CHAIRMAN
Administrative Vice President
Mountain Fuel Supply Company

James Petersen
Director of Employee Relations
Utah Copper Division
Kennecott Copper Corporation

Theodore Maughan, Director
Utah State Employment Service

John J. Lette, Director
Utah Division of Industrial Promotion

William T. Cockayne, President
Utah Manufacturers' Association and
former Chairman, Utah-Idaho Sugar Company

Ken D. Sampson
Manager, Logan Division
Schreiber Cheese Company

Jerry G. Thorn, President
Thorn Construction Company, Inc.

Dee Hutzley, President
Wangsgard, Inc. and
Utah Retail Grocers' Association

Russell Williams
Personnel Director
The Church of Jesus Christ of Latter-day Saints

William Call, Secretary
Utah State AFL-CIO

APPENDIX H

Appendix H contains materials relating to the internal training and development for Human Resource Analysts in support of organizational goals and objectives. The following materials are represented:

1. Team Development Program
2. Immediate Team Development Activities
3. Sample Training Case Study - Assessment of Training Needs
4. Sample forms to identify orientation and training needs and available resources
5. Critical Skill Areas of the Human Resource Analyst.

TEAM DEVELOPMENT PROGRAM

Objectives	Timeframe	Competence Level	Experience	Resource	Person Responsible	Environment	Method
1. Interview to obtain data	Immediate	Great	Cognitive/ Process	Internal	Cragun	Individual/ Group	Video Tape
2. Speak language of people interviewed	Immediate	Great	Cognitive	External	--	Individual/ Group	
3. Skills necessary to construct instrument	Immediate	Great	Cognitive	Internal	Mecham (Team)	Individual/ Group	
4. Historical development of public manpower programs	On-going	Some*	Cognitive	Internal	Hansen	Individual	
5. Great Britain's program	On-going	Some*	Cognitive	Internal	Hansen	Individual	
6. Current political scene as it relates to manpower programs	On-going	Some*	Cognitive	Internal/ External	Bentley	Individual	
7. Learning theory	On-going	Some*	Cognitive	Internal	Mecham	Individual	
8. Operant conditioning	On-going	Some*	Cognitive	Internal	Mecham	Individual	
9. Proposal format and report presentation	Long-range	Some*	Cognitive	Internal/ External	Hansen	Individual/ Group	
10. Use of library	Immediate	Great	Process	External	Mecham (Wooley)	Individual/ Group	
11. Items available in library	Immediate	Great	Cognitive	External	Mecham (Rose, Wooley)	Individual/ Group	
12. Journals' contribution	Immediate/ On-going	Great	Cognitive/ Process	Internal	Bentley (Hansen, Cragun)	Individual	

107

Objectives	Timeframe	Competence Level	Experience	Resource	Person Responsible	Environment	Method
13. Basic procedures on how to get around bureaucracy of University	On-going	Some*	Process	Internal	Rose (Seminar)	Group	
14. Group dynamics/ interpersonal skills	On-going	Great	Cognitive/ Process	Internal/ External	Cragun	Group	
15. Existing training programs - Management - Operator - Apprenticeship	Immediate	Some	Cognitive	Internal	Miskin (Seminar)	Group/ Individual	
16. Information from Labor Unions	On-going	Some*	Cognitive	Internal	Hansen	Group	
17. Personnel techniques - Evaluation of human potential - Testing - Job analysis - Interviewing - Interest assessment - Motivation theory and techniques - Job enrichment - Wage & salary schemes	Immediate	Some*	Cognitive/ Process	Internal	Mecham (Cragun)	Individual/ Group	
18. Evolution of personnel philosophy (public and private)	Immediate	Some	Cognitive	Internal	Bentley (Cragun)	Individual/ Group	
19. Understanding of business mentality	Immediate	Some	Cognitive/ Process	Internal	--	Individual/ Group	
20. Management theory	Immediate	Some	Cognitive/ Process	External	Cragun (Carlisle)	Individual/ Group	

Objectives	Timeframe	Competence Level	Experience	Resource	Person Responsible	Environment	Method
21. Model building	Intermediate	Some*	Cognitive/ Process	Internal	Heninger	Individual	
22. Techniques of assessing training benefits	Intermediate	Great	Cognitive	Internal	Mecham	Individual/ Group	
23. Organizational behavior	Immediate	Great	Cognitive/ Process	Internal	Cragun	Group/ Individual	
24. Systems	Long-range	Some	Cognitive	Internal/ External	Heninger	--	
25. Relevant literature (proposals, etc.)	Immediate	Great	Cognitive	Internal	Hansen	Individual	
26. Organizational development	Immediate	Great	Cognitive/ Process	Internal	Cragun	Group/ Individual	
27. Psychomotor (learning)	--	--	--	--	Mecham	--	

Note:

*One specialist

IMMEDIATE TEAM DEVELOPMENT ACTIVITIES

Priority	Activity	Person Responsible
1	Interviewing	Cragun
	Talk language	--
1	Construct instrument	Mecham
	Using library	Mecham
	Available in library	Mecham
	What journals can contribute	Bentley
2	Existing training programs	Miskin
2	Personnel techniques	Mecham
2	Evolution of personnel philosophy	Bentley
2	Management theory	Cragun
2	Business mentality	Cragun
1	Organizational development and behavior	Cragun
1	Relevant literature	Hansen

MENS BOOTS LTD.

CASE STUDY - ASSESSMENT OF TRAINING NEEDS

Objective of the Exercise

The MDS team is required to produce a "Plan of Action" for dealing with the human resource problems of Mens Boots Ltd.

Method

The exercise will be broken up into three parts:

Part I	Data Collection	Manpower problems Operating problems Changes problems
Part II	Assembly and Analysis of Data	Non-training problems Immediate training priorities Long-term training priorities
Part III	Preparation of a "Plan of Action"	Problem(s) Evidence Action

Role of the Tutor

The exercise tutor will operate under the following roles as and when the need arises.

1. Role play: Member(s) of the work force of Mens Boots Ltd.
2. Tutor: Provide inputs to the group at critical points during the exercise.
3. Advisor/Catalyst: Make interventions when the group is at work by request or when a need is perceived.

MANPOWER DEVELOPMENT SERVICE

PERSONAL TRAINING AND DEVELOPMENT OBJECTIVES

I. List your personal training and development objectives for this month (what you would like to read or study, what techniques or skills you would like to acquire, what conferences or seminars you would like to attend, etc.).

II. If you need additional resources or help that is beyond your control, indicate the general area you desire help in, and the specific individual or information, if known, that will help you accomplish your objectives.

III. Did you achieve your last month's objectives?

ORIENTATION MATERIAL

TRAINING - TEACHING

I. Please indicate by topic or title specialized areas of interest and expertise that you feel competent and willing to develop as training sessions for MDS training and development purposes:

ORIENTATION MATERIAL

TRAINING - BIBLIOGRAPHY

I. Please list the essential works and references that every HRA and intern should be familiar with as part of his general training and orientation:

II. Please list the essential works and references in your specialized area(s) of interest and expertize that someone knowledgable in your field should be familiar with (please indicate the field as well as the literature):

CRITICAL SKILL AREAS OF THE
HUMAN RESOURCE ANALYST

OUTREACH ACTIVITIES	
Group Presentations	Take sufficient time to give examples and fully explain the services offered by MDS.
	Anticipate and resopnd to the interests of the group.
	Stimulate discussion and answer their questions to allow better understanding of MDS services.
Contacts with Other Agencies	Be knowledgeable of the agency in question.
	Look for areas of mutual benefit.
	Don't "step on toes" of the agencies' activities or motives.
INITIAL VISITS	
Establish Rapport	Remember you are dealing with the managements' perceptions and act accordingly.
	Don't be so agreeable with the conclusions drawn, however, that you are unable at a later time to take exception if necessary.
Explain MDS Services	Don't be too detailed in describing MDS's origin or philosophy.
	Anticipate and respond to the employers' interests and degree of understanding.
	Explain how the nature of this project justifies the provision of free services.

INITIAL VISITS (cont.)

Relate Services to Employers' Needs	Be alert to identify employers' needs.
	Be specific and use examples whenever possible.
	Suggest specific benefits to be derived from MDS assistance.
Specify Working Relationships and Expectations	Don't be vague and ambiguous in defining MDS expectations and activities.
	Consciously begin to gain the commitment of the management to organizational change.

DIAGNOSIS

Identify the Need for Data Collection	Emphasize the importance of information for better management practices as well as for MDS intervention.
Collect Data	Make use of all information available in the organization(see attatched chart).
Analyze Data	Study all data gathered for patterns, common causes, basic problem areas, etc.
	Identify the areas for improvement that will have the most impact on organizational effectiveness.
Management Interaction	Involve management extensively in the analysis of the data.
	Build on areas of agreement with the management and confront relevant issues when necessary.
	Be alert for opportunities for mutual learning and a sharing of experiences.
Solutions and Strategies	Get the management INVOLVED in the examination of alternative solutions and strategies for implementation.

IMPLEMENTATION AND FOLLOW-UP

Catalyst

Provide management with the necessary encouragement and support to enable them to effectively implement their own strategies for organizational improvement.

Liaison

Refer management to the appropriate agencies for specific helps that the diagnosis indicates. These would be services that the company would not have the resources to conduct and that would be too specific or time consuming for MDS to offer.

Workshops

Conduct workshops to assist in the implementation of solutions specific to the needs arising from the diagnostic study. Emphasis should be on achieving results on the job through activities designed for the situation at hand.

Sufficient time should be spent in preparation to insure that each session is geared toward the objectives identified from the diagnosis.

Each individual session should be responsive to the needs of the group and be flexible enough to make any necessary adjustments required to achieve the desired results back on the job.

Evaluation and Measurement

At all points of intervention, the HRA should be aware of measuring the effects of MDS in the organization.

REACTION to the intervention.
LEARNING on the part of the participants.
BEHAVIOR CHANGES back on the job.
RESULTS in the productivity and profits of the organization.

GENERAL

The HRA must be alert and tactful in all interactions with company management to sufficiently understand their perceptions and appropriately deal with them. Organizational change is dependent upon the attitudes and commitment of top management. This requires the HRA to be able to build on areas of agreement, learn from management experience, and to effectively introduce realistic change strategies that the company management can and will support.

DATA COLLECTION

INTERVIEWS-QUESTIONAIRES-GROUP MEETINGS

Management-Supervisors-Employees-External Sources.

PERSONNEL RECORDS

Turnover-Absenteeism-Sick Leave-Accident Rate-Tardiness-Grievances-Merit Ratings-Supervisory Actions-Inspection Reports-Supervisory Selection Process-Etc.

OBSERVATION

Morale:	Personal Friction-Buckpassing-Complaints-Inattention to Work-Informal Leadership-Supervisory "Personal Touches"-Lack of Supervisory Support-Goal Orientation.
Job Knowledge:	Technical-Administrative-Supervisory.
Communication:	Written or Oral Instruction Understanding-Upward Flow-Downward Flow-Horizontal Flow-Blockages-Bottlenecks.
Supervision:	Work Assignments-Planning and Scheduling-Instructing-Handling Complaints-Job Pride-Job Interest-Coordination-Recognition to Employees-Support to Employees-Support to Supervisors.

APPENDIX I

UTAH STATE UNIVERSITY AND ITS DEPARTMENTS OF BUSINESS ADMINISTRATION, ECONOMICS, INDUSTRIAL AND TECHNICAL EDUCATION, AND PSYCHOLOGY ANNOUNCE AN INTERDISCIPLINARY MASTERS OPTION IN HUMAN RESOURCES DEVELOPMENT COMMENCING FALL QUARTER, 1975

HUMAN RESOURCES DEVELOPMENT

Human Resources Development (HRD) is both a specialized area of advanced study and a professional career. It has appropriately been described as "activities. . . involving expertly studied, designed, and implemented programs of planned change in work itself, and the realignment of task and decision structures." It is a newly emerging field dealing with the development and management of human resources at work and the involvement of management, labor, union, and environmental forces toward the goals of greater sharing of personal, organizational, social, and economic values.

NEED AND RATIONALE FOR HUMAN RESOURCES DEVELOPMENT

The need for an academic and practical emphasis in HRD has been building dramatically during the past decade and has been brought to public attention by conditions of job dissatisfaction, alienation, anomie, the breakdown of traditional institutions, the dawning of a new anti-mechanist era, rising employee expectations, and a falling rate of labor productivity that has spawned a half-dozen blue-ribbon commissions and institutes mandated to identify the causes of the increasing inefficiency and ineffectiveness at the workplace. That battle has been joined by academic institutions through the development of work-related programs of study seeking to train and develop capable professionals who will deal with the cause and effect of these conditions in the workplace. The preparation of these professionals requires additional skills and different emphases than those demanded of specialists in traditional personnel and training departments. The HRD specialist embraces a more comprehensive, systems-oriented approach to the effective development and utilization of human resources, organizations, jobs, and positions.

CAREER OPPORTUNITIES IN HUMAN RESOURCES DEVELOPMENT

Graduates with a Masters option in HRD can expect a strong and growing demand for their services in both the public and private sectors in such challenging and dynamic positions as: personnel specialists and administrators, training officers, training managers, labor and management relations staff, manpower planners, organization development consultants, wage and salary specialists, affirmative action officers, counsellors, job analysts, employment service employer relations representatives, contract service representatives and other professional staff, human resource analysts, and human resource managers and directors.

UTAH STATE UNIVERSITY

For many years, Utah State University has been engaged in the education and training at the undergraduate and graduate levels of personnel specialists, labor relations staff, and industrial and technical training specialists and counsellors. More recently, the University has been the site for the establishment of a unique resource, the Manpower Development Service, which has been providing a wide variety of organization and human resource consulting services to public and private organizations throughout the state of Utah and the surrounding Intermountain West. As a result of the extensive work being carried out by MDS, an awareness has developed that there exists among these programs a common core of education, training, and experiences; and that if properly structured, an academic program can be designed to provide a unique and dynamic Masters program which would effectively meet the growing need for highly competent organization and human resource development professionals capable of meeting the challenges and problems of modern society. Such a program now exists at Utah State University and will be offered commencing fall quarter, 1975.

DEGREE REQUIREMENTS

The Masters option in Human Resources Development is offered as an interdisciplinary approach to graduate professional training through four departments: Business Administration, Economics, Industrial and Technical Education, and Psychology. The minimum number of credit hours required for each of the program options is 45. The maximum number required may exceed that figure depending on the particular program option and student needs.

For those individuals or organizations desiring a non-degree granting program to meet specific needs and requirements, a flexible program combining on-campus classes with field work under the supervision of appropriate, experienced MDS personnel can be designed.

The specific degree requirements for each department are as follows:

HUMAN RESOURCES DEVELOPMENT OPTION
WITHIN THE MASTERS DEGREE IN BUSINESS ADMINISTRATION

The advanced program curriculum (second year for a non-business undergraduate) is as follows:

I. MBA Core

BA	689	Business Policy	3
BA	662	Human Aspects of Administration	3
BA	664	Organizational Behavior	3
BA	681	Management Theory	3
BA	642	Advanced Finance	3
BA	672	Operations Management	3
Econ	620	Labor Economics	3
BA	683	Business and Its Environment	3
BA	697	Thesis	9
(or)			
BA	695, 696	Research Options	6
			30-33

II. HRD Option

BA	668	Theories and Practices in Organizational Development	3
BA	666	Training Theory and Techniques in Organizations	3
Econ	626	Economics of Socio-Technical Systems	3
BA	667	Seminar in Labor Relations	3
			12

The remaining three hours (for those selecting the Research Options) will be selected from the advanced BA courses or from advanced electives. In the case of a person selecting the Thesis Option for the research requirement, no electives would be possible.

HUMAN RESOURCES DEVELOPMENT OPTION WITHIN THE MASTERS DEGREE IN ECONOMICS

The course requirements for a person seeking a Human Resources Development option within the Master of Science in Economics are as follows:

I. Economics Core

Econ 600	Income Theory	3
Econ 601	Price Theory	3
Econ 620	Labor Economics	3
	Twelve hours of courses numbers 600 or above with the following restrictions: Economics 697 (Thesis) may not be counted, and a maximum of three credits of Economics 690 (Readings and Conference) may be counted.	12
	Courses from five of the subject areas of Economics (as approved by the Committee)	
	Six hours of Statistics numbered 300 or above (only for those who have not had previous courses in Statistics)	
	Thesis	9-12
		30-33

II. HRD Option

Econ 626	Economics of Socio-Technical Systems	3
BA 622	Human Aspects of Administration	3
BA 666	Training Theory and Techniques in Organizations	3
BA 667	Seminar in Labor Relations	3
BA 668	Theories and Practices of Organization Development	3
BA 664	Organizational Behavior	3
		18

For students desirous of following a non-thesis program, the requirements are the same as under the Economics Core listed above (I.) with the exception of the deletion of the Thesis and the requirement in the number of hours of courses numbered 600 or above, which is increased from 12 to 21. Also a written final examination may be given instead of a final oral (Thesis) examination.

HUMAN RESOURCES DEVELOPMENT OPTION
WITHIN THE MASTERS DEGREE IN
INDUSTRIAL AND TECHNICAL EDUCATION

I. ITE Core

ITE 607	Philosophy of Vocational Education and the Practical Arts	3
ITE 609	Curriculum Development in Industrial Education	3
ITE 624	History of Industrial Education	3
ITE 654	Measurement in Industrial Education	3
ITE 675	Research in Industrial and Technical Education	3
ITE 697	Research and Thesis Writing	3-9
		18-24

(For the Master of Industrial Education degree, ITE 691, Industrial Education Experimental Lab, and ITE 690, Reading and Conference, and 9 Credits in technical courses are required in lieu of ITE 697.)

II. HRD Option

BA 668	Theories and Practices of Organization Development	3
BA 666	Training Theories and Techniques in Organizations	3
Econ 626	Economics of Socio-Technical Systems	3
BA 667	Seminar in Labor Relations	3
BA 662	Human Aspects of Administration	3
Econ 620	Labor Economics	3
BA 664	Organizational Behavior	3
		21

The remaining 3 to 6 hours (for those selecting the thesis option) will be selected from the advanced ITE courses or from approved electives.

HUMAN RESOURCES DEVELOPMENT OPTION WITHIN THE MASTERS DEGREE IN PSYCHOLOGY

The following Human Resources Development option is designed for a person seeking a Masters degree in Psychology with a specialty in Counselling. It is assumed that a person undertaking this program has an undergraduate degree in Psychology or a minimum of 30 hours undergraduate Psychology courses as a background.

I. Psychology--Counseling Core

Psych.	530	Psychometrics	5
Psych.	721	Personality	3
Psych.	620	Principles of Counselling	3
Psych.	621	Theories of Counselling	3
Psych.	630	Practicum in Counselling	3
Psych	622	Group Process	
		(or)	3
BA	664	Organizational Behavior	
Psych.	636	Practicum	3
Psych.	372	Behavior Modification	3
Psych.	666	Principles of Learning	3
Ed. Ad.	667	Research in Psychology and Education	
		(or)	3
BA	695	Business Research Methods	
Psych.	697	Research--Thesis	9
Ed. Ad.	660	Correlation and Regression is Psych. and Ed.	
		(or)	3
Ed. Ad.	661	Statistical Inference in Psych. and Ed.	
			44

II. HRD Option

BA	668	Theories and Practices of Organizational Development	3
BA	666	Training Theory and Techniques in Organizations	3
Econ	626	Economics of Socio-Technical Systems	3
BA	667	Seminar in Labor Relations	3
BA	662	Human Aspects of Administration	3
Econ	620	Labor Economics	3
			18

Students desirous of completing a Masters degree in the Psychology Department should obtain a copy of that Department's Graduate Student Handbook for additional information about departmental procedures and requirements.

REQUIREMENTS FOR ADMISSION

Admission to the HRD Masters program option is predicated on admission to one of the four cooperating departments, Business Administration, Economics, Industrial and Technical Education, or Psychology. The requirements for each department are as follows:

I. Business Administration

In reviewing an application, the Admissions Committee for the MBA program considers the following five factors:

A. Undergraduate gradepoint average. A 3.0 gradepoint (4.0 base) is desired, although a student with a gradepoint lower than this is considered if other aspects of his application are highly favorable. (Two official transcripts from each junior college, college or university at which the applicant has completed work must be submitted.)

B. Scores on the "Graduate Management Admission Test" This test in given four times annually on a national basis by the Educational Testing Service. For information, test schedules and registration forms, write the Graduate Management Admission Test, Education Testing Service, Box 966, Princeton, New Jersey, 08540. An applicant must submit the scores obtained on this examination.

C. Letters of recommendation submitted by three former instructors or associates.

D. Personal interviews with faculty representatives, if necessary.

E. Prior experience and maturity.

F. Foreign students must complete the above requirements and should submit scores from the Test of English as a Froeign Language (TOEFL) A score of 500 on this exam is a minimum acceptable score.

Formal application should be made to the Dean of the School of Graduate Studies. The deadline for application for Fall Quarter is August 1.

II. Economics

The requirements for admission to the Economics Graduate Program are essentially the same as those for the Department of Business Administration with the exception of test scores. The scores from the Graduate Record Examination rather than the GMAT should be submitted as part of the student's application.

III. Industrial and Technical Education

The requirements for admission to the Industrial and Technical Education graduate program are the same as those listed for the Economics Department.

IV. Psychology

The Psychology Department requires a Graduate Record Examination score of 1100 and a gradepoint of 3.0 in undergraduate work, plus excellent recommendations.

INTERNSHIP

Where appropriate, a structured internship experience with USU Manpower Development Service or other public and private employers will be planned for those students participating in the program, to give them an opportunity to gain practical experience and improve their skills as human resource development professionals.

GENERAL POLICIES

Advisors and supervisory committees for each student in the HRD program option will be appointed by their respective departments in accordance with departmental procedures. The membership of these committees will include HRD staff as chairman or members as appropriate.

The performance standards and examinations will also be those established by the respective departments.

By the beginning of the third quarter of residence in the program, students are required to submit a plan for program completion (Admission to Candidacy Forms). This should include provisions for fulfillment of academic and other requirements, e.g., thesis project, internship, etc.

FINANCIAL ASSISTANCE

The cooperating departments will make every effort to secure financial assistance for graduate students with genuine promise. The departments offer a number of fellowships, assistantships, and part-time instructorships which are awarded on a competitive basis. There are also research appointments available in connection with research work of individual faculty members and the Manpower Development Service. The Director of Graduate Programs in the respective departments should be contacted for further details about financial assistance.

If the student is requesting a fellowship or other financial assistance, his application for admission, with transcripts and examination scores, will need to be submitted to the Office of Graduate Studies on or before Feb. 15.

FURTHER INFORMATION

For further information, contact:

Dr. Gary B. Hansen
Manpower Development Service
UMC 35
Utah State University
Logan, UT 84322
Telephone 801 - 752-4100, Ext. 7203, 7300

APPENDIX J

SUCCESSFUL WORKSHOP TRAINING OF LOCAL GOVERNMENT OFFICIALS

By:

Douglas J. Brunnette

July 8, 1975

The forgotten people of government, whose most frequent communications are complaints from irate citizens, who oftentimes are underpaid and overworked without the recognition they deserve, have suddenly found themselves responsible for more programs and problems than they ever bargained for. These individuals are local government officials. They may be mayors, county commissioners, councilmen, local administrators, or corresponding staff. Presently, they are faced with such issues as land use planning, manpower planning, solid waste collection and disposal programs, EPA standards that outlaw their sewage treatment plants, OEO regulations that strain their simplistic personnel systems, and a constant barrage of new federal and state programs for which they have suddenly become responsible.

An intergovernmental shifting process has been taking place, particularly over the last five years, that has placed this heavy responsibility on the shoulders of local government people. The major purpose for transferring government accountability from the federal to the local level was to provide local government officials with the opportunity to be the decision-makers, rather than people far removed in a state capital or in Washington, D. C. Unfortunately, a weak assumption has been made in the process--that local government officials will be able to effectively administer programs or solve problems which federal officials have not been able to manage or answer. It might be possible for local government officials to fulfill their new responsibilities, if they were given the training necessary to handle the complex issues involved. However, it appears once again that much of the training they have been subjected to has not produced the kind of assistance they need.

"Why does it seem so difficult to train local government officials effectively?" No doubt, many a trainer has left a workshop or other training activity held for a local government group with this frustrating thought. For some reason, the trainees just didn't get the message. They didn't understand how the case study, role-playing, or other training activity related to their own responsibilities in government. Unfortunately, it is often the local officials who are looked on as the cause of such an ineffective training experience, rather than the trainer or the material he presented. In reality, the information and training techniques employed were not designed for the local government decision-makers or administrators receiving the training.

Two basic incorrect approaches are used that consistently prove their ineffectiveness. The first is using training materials designed for individuals who are managers in the private sector. The trainer hopes that the local government officials will see the transferability of the concepts to their own situation. Good Luck! Certain basic principles may be common to both private business and public organizations, but more often than not, the differences are deep enough to damage any attempt to bring about effective transfer. The second incorrect approach is not as ineffective as the first, but it still is not the answer: trainers who use training materials generally designed for local government officials, but not for the specific local officials they are training. An example of this would be a trainer talking about effective decision-making in local government using a model for urban communities, rather than developing a model that would be suitable to decision-making in a rural community where most of the local officials being trained live and work.

As a result of not adapting the training activities to the situations and needs of the local government officials in attendance, the time spent in training is often wasted, at least from the trainees' viewpoint. The officials resent being instructed from material not tailored to their particular circumstances. Also, they do not appreciate listening to a trainer who does not personally understand their problems. The officials' feelings are often typically expressed in the following manner, "What does that guy think he's doing, coming in here telling us how to solve our problems!" Thus, even though the trainer may be very capable, if he is not familiar with the situations facing the officials he is instructing, he will frequently find that his training efforts are futile.

The MDS Experience

Recently, the Manpower Development Service (MDS) of Utah State University had the opportunity to find out if it were possible to design workshop activities for local government officials that would be meaningful and worthwhile. The 6-County Commissioners Organization, a multi-county intergovernmental group composed of 18 county commissioners from Central Utah, requested MDS assistance in providing a beneficial training experience for local government officials from their area.

More specifically, MDS was asked by the 6-County Commissioners Organization to provide training for county commissioners, mayors, and other local government administrators by means of a one-day workshop activity. The local officials in the 6-County area were divided into three groups so that the potential number of participants at each workshop would not exceed 25, thus ensuring or facilitating more effective training. Basically, there were

four purposes for the workshop activities:

1. To provide the local government officials with the opportunity to meet together in a training activity especially designed for them that was worth their time.
2. Generally to give them an opportunity to discuss and attempt to solve common problems peculiar to their area.
3. To instruct them about a decision-making, problem-solving approach that would help them be more effective policymakers.
4. To make the officials aware of their decision-making and planning responsibilities with respect to local manpower planning as mandated in the Comprehensive Employment and Training Act (CETA).

To accomplish the four purposes of the workshop, MDS found it necessary to take a number of steps before the actual workshops began. These steps were crucial to the desired success of the training.

1. MDS received from the regional manpower planner of the 6-County area a list of all the government officials who would be invited to one of the three workshops conducted. The regional manpower planner served as the administrative link between MDS and the 6-County Commissioners Organization and was involved in instructing the local officials about their responsibility for effective local manpower planning.

2. Prior to the workshops, MDS contacted the local officials invited. These contacts were made for a number of important reasons:

   a. To give MDS the opportunity to meet the local officials and become familiar with their jurisdictions.

   b. To give the local officials the opportunity to indicate to MDS the nature of the problems they were facing in their communities.

   c. To find out what the local officials knew about CETA and if they were aware of their responsibilities with regard to local manpower planning.

   d. Most importantly, to demonstrate to the local officials that MDS was interested in what the officials were concerned about, and wanted to incorporate these concerns into the workshop activities.

3. After contacting the local government officials, MDS studied the results of the personal interviews. Problems mentioned by local officials were pinpointed. From the information given to MDS, the actual training format was devised. The framework of the workshop included the following items:

   a. It was decided by MDS, with the encouragement of the 6-County Commissioners Organization, to list the common problems mentioned by the local officials and to discuss the items at the beginning of each workshop.

b. MDS devised an "In-Basket" exercise.[1] In the In-Basket exercise, the participants were placed in the role of a mayor of a small town similar to a community in the 6-County area. They were to respond individually to the communications they received from seven different sources and then meet together in small groups to come up with a consensual answer to each problem. The problems and concerns presented in the seven correspondence items were based on actual situtations mentioned by the local government officials during the preassessment interviews.

c. To provide information on local manpower planning MDS developed handout material in conjunction with the 6-County manpower planner to be presented to the local government officials by the manpower planner during the lunch hour. The planner would explain the manner in which the local manpower program was to function, as outlined in CETA, and answer questions the officials had about the manpower programs.

d. During the afternoon, MDS was to present an action-planning approach to the local officials. The approach was designed to make the trainees more effective decision-makers and problem-solvers. Ideally, the workshop participants would implement the approach in the future. To encourage

implementation MDS would give the local government officials the assignment of formulating a manpower program for their jurisdictions using the action-planning approach. The 6-County manpower planner would then visit the local government officials in the near future to discuss the local manpower plans they had devised.

The actual implementation of the workshop activities went fundamentally as planned. MDS did find the local officials very willing to discuss common problems and to confront each other constructively when certain issues of conflict arose. Because of the informality of the workshops, which was encouraged, the original timetable of training activities needed adjustment as the day progressed. MDS felt, however, that the group interaction and problem-solving was more important than rigidly following the originally planned outline of training activities.

Assessment of Workshops' Success

MDS was very interested in finding out the reaction of the local government officials to the training they had received. In order to discern the officials' reactions, MDS did the following:

1. Observed the behavior of the local officials during the workshop and how they responded to the training activities.
2. Contacted approximately twenty percent of those who attended the workshop to find out how they felt about the training. The contacts were made by telephone three to four weeks following the workshops.

3. MDS talked with individuals such as the 6-County manpower planner, who had contact with the local government officials on a regular basis, to see if the officials had made comments about the workshop training and what these comments were.

From the above sources of information, MDS drew the following conclusions. First, the local government officials felt the workshops were well worth their time. The principal reason given for this was because the workshop materials were based on the preassessment information communicated by the officials to MDS. The officials thus discovered, during the workshop, that their concerns were reflected in the material provided.

Second, behavior change on the part of the local government officials as a result of the training was known to have occurred in several identifiable instances. Examples of behavior change were found in the following cases:

1. A newly appointed city administrator of a small town demonstrated needed leadership desired by the City Council. The mayor of the community attributed the city administrator's beneficial managerial style change to the MDS workshop experience.
2. County commissioners from two of the six counties desired to know what a third county was doing in order to meet periodically with mayors from their county. MDS indicated during the workshop that greater cooperation between mayors and county commissioners would be desirable, as indicated by preassessment interviewing.

3. Local manpower planning was undertaken with the local government officials through the 6-County manpower planner. This was a desired result for the manpower planner, who saw the workshop as an opportunity to talk to the local officials and familiarize them with local manpower planning.

Third, a change of attitude on the part of the workshop participants toward specific concerns occurred, but it is difficult to say to what extent. It was apparent that local town officials and county commissioners had a better understanding of each other's problems than they had previously. Also, the locally elected officials received feedback from full-time city workers concerning problems the workers were facing that many of the locally elected officials were not aware of. Thus, the officials became more sensitive to the workers' concerns. In addition, the 6-County area manpower planner received information from the local government officials that caused him to realize he should be doing certain things he had not done to date to improve overall manpower planning with the officials in the area.

Observations

MDS felt that three of the four major purposes of the workshop training were accomplished:

1. A workshop activity was designed and administered that was looked upon as being worthwhile to those local officials who participated, due to the tailoring of the workshop materials to their particular concerns and needs.

2. An opportunity was provided for local government officials to meet together and discuss common problems and formulate solutions to these problems.
3. The manpower planner of the 6-County area had an opportunity to explain the local manpower program and what the local government officials could do to make it more successful.

The fourth objective, that of instructing the local government officials about a decision-making, problem-solving approach, was questionably successful. This was primarily due to the lack of the time necessary to provide the local officials with workshop experience in using the problem-solving tool. A lecture approach was used due to a shortage of time, and workshop participants were given the assignment of studying the written materials on the problem-solving technique on their own.

Recommendations

MDS strongly endorses the approach that was used in the workshops conducted for local government officials of the 6-County area of Central Utah as outlined. A number of suggestions now follow that would further ensure success of similar future training activities:

1. Since the nature of the workshop training is to provide activities that are meaningful to the local officials, a great deal of program flexibility should be planned on to give the officials the opportunity to make comments and interact amongst each other as they desire. Allowing for open comment and discussion increases the cohesiveness of the group. However, it should be kept

in mind that such an approach can affect the timetable of activities planned by the trainer and cause him to make alterations in the training activities he has planned.

2. It is important to allow sufficient time for the necessary preassessment work preceding the training activities. Preassessment is the key to the success of the approach and should not be categorized as a secondary item. Also, whoever will be conducting the training activities should be actively involved in the preassessment interviewing. Without personal contact with the officials before the training, the trainer is jeopardizing his ability to relate to the participants during the training.

3. Since many of the local government officials are serving in their positions on a part-time basis, with very little financial reward, it is important to properly plan the training activities at a time when the greatest majority can attend. For example, in the MDS experience the ideal time would be in the winter months, since many of the local officials would be engaged in agricultural activities during the more pleasant months of the year. In addition, it is important to have the assistance of local government personnel in encouraging the local officials to participate. MDS was assisted by the 6-County manpower planning office in this regard. The local assistance had a marked effect on the number of government officials who attended the workshops.

Conclusion

MDS is certain that training tailored to the needs of local government officials can be successful for all those concerned. Necessary time and resources required to conduct preassessment activities and design customized training materials are well worth the investment made. In conclusion, there is an Indian prayer that states:

> Great Spirit, grant that I
> May not criticize my neighbor
> Until I have walked
> a mile in his moccasins.

The theme of this adage has direct application to training, and MDS strongly endorses the idea of trainers figuratively walking a distance in the moccasins of those whom they intend to benefit.

FOOTNOTES

1. An "In-Basket" exercise is a training instrument that places participants in the role of an individual who is receiving communication from various fictitious persons and organizations having problems and concerns the individual must deal with. Each participant responds to the communication as though he were the individual receiving the correspondence.

APPENDIX K

PROPOSAL TO PROVIDE
CONSULTING AND TECHNICAL ASSISTANCE SERVICES
TO THE
NORTHERN WASATCH ASSOCIATION OF GOVERNMENTS

April 15, 1975

Submitted by:

USU-Manpower Development Service
Logan, Utah
84322

Introduction

The 1973 Comprehensive Employment and Training Act (CETA) created a decentralized manpower planning system which has placed great responsibility and authority with local manpower planners and manpower planning councils. The Act clearly intended that these groups engage in broad-gauge strategic planning--what should be done and who should do it--with the details and responsibility for execution delegated to functional specialists, and the delivery of services delegated to qualified contractors.

Given the nature and extent of their responsibilities, the CETA manpower planners must supplement their staff by using community resources to provide additional or unique functional skills and deliver approved manpower services. Only by so doing can they hope to successfully provide for the multitude of tasks necessary to plan, develop, monitor, and adopt a manpower program that will truly (and continuously) fulfill the needs of the local community.

The USU Manpower Development Service (MDS) is one of the community resources which CETA manpower planners can utilize to assist in meeting analysis, technical assistance, or evaluation needs. MDS, which was founded at Utah State University by a grant from the U. S. Department of Labor in 1972, has provided extensive manpower development consulting assistance to both public and private employers throughout the state of Utah during the past three years. The nature of these services has varied, but the overriding objective has always been to design the services to meet the unique needs of the particular employer or group being assisted. The MDS staff has developed particular skills in:

(1) Data collection and analysis to diagnose organizational and human resource problems and develop appropriate solutions.

(2) Technical assistance to create or improve training programs, conduct skill, supervisory, and management training, and improve manpower management policies and practices.

(3) Evaluation of the effectiveness of training and development programs.

In recent months and with the encouragement of the Manpower Administration, MDS has been working extensively with CETA manpower planners and staff members in several AOG's in the state. These activities have involved all three general services mentioned above and have provided MDS with a realistic knowledge of the problems the local manpower planner is confronted with. This knowledge of CETA, combined with the experience gained over the past three years working with employers statewide, qualifies MDS to provide unique resources to assist manpower planners in several ways.

The following proposals represent some specific areas of activity where MDS expertise might be immediately utilized by an AOG manpower planner to assist him in more effectively carrying out his responsibilities under CETA. The services discussed are clearly identified as being both appropriate and

fundable out of monies made available to local AOG's under CETA. Both the legislation and regulations make specific references to these and other types of services not now being provided, and the positive language indicates an awareness on the part of Congress and the Manpower Administration of the need for them and the value of having them provided.

MDS does not see nor does it propose that its function be one of duplicating or usurping the proper planning and other roles assigned to AOG manpower planning staff and council. Rather, MDS can provide AOG manpower planners with a unique manpower consulting and operational capability to help them translate AOG-developed policies and planning decisions into successful programs that more effectively achieve council objectives. One of the most important functions MDS can perform is to help provide an optimal interface between the AOG and the employer community, which will help bridge the gap between planning decisions and successful operational programs. Experience under CETA suggests that such a gap does now exist; few of the activities proposed herein are now being accomplished, or if carried out to a degree, the results are not as effective as they could be with the addition of the proposed services.

How MDS Can Assist CETA Manpower Planners

MDS can assist the CETA manpower planners in the following general areas:

(1) Outreach: Increase the number of employers willing to cooperate in utilizing manpower services[1] and thereby accomplish CETA objectives. Inform and educate local public officials about CETA and how they may benefit therefrom.

(2) Diagnosis: Assist in objective information-gathering and analysis of employers' manpower needs and interests; local labor force and labor market characteristics; institutional capabilities; and manpower agency staff in-service training needs.[2]

(3) Evaluation: Provide assistance in objectively evaluating on-going manpower training programs funded through CETA by direct contact with employers, past and present trainees, and training institutions.[3]

(4) Technical Services: Assist AOG manpower planners to design new, and innovative manpower services which may have much greater value than traditional, categorical programs inherited from MDTA. Assist in designing effective manpower training (OJT, etc.) for employers cooperating in accomplishing CETA objectives; provide in-service training for manpower agency staffs; provide supervisory/management training for employers of disadvantaged workers; assist in the design and improvement of training curricula in skill centers and other institutional training agencies to ensure relevance with employer needs.

Description of Specific Services Offered by MDS

The following list of services is not meant to be all-encompassing, but rather suggestive of the kinds of services MDS has been or is now being called upon to perform, or which our experience indicates may be most appropriate and relevant to the current needs of local manpower planners.[4]

I. Outreach Services. Two types of outreach services could be provided by MDS.

A. Seminars or workshops for employers not currently participating in CETA programs.

B. Customized workshops for local public officials based on local problems and needs of public officials with a manpower emphasis.

A. Service: Seminars or workshops for employers not currently participating in CETA programs.

Purposes:

1. To serve as a marketing approach to acquaint employers with the CETA program in their area and the personnel who administer the program to find out how they can participate in the CETA program to better meet their own manpower needs while assisting to maximize the utilization of the community's human resources.[5]

2. To enable employers to meet in a peer group to discuss human resource needs and problems common to their labor market area.

3. Use the management skills and human resource knowledge of the MDS staff to organize and conduct sessions designed to teach management skills while acquainting employers with CETA programs.[5]

Action Plan:

1. MDS would meet with CETA staff to determine which employers to contact, what types of jobs are needed to meet the needs of eligible participants, or any other useful data.

2. MDS would do a preassessment of local area manpower needs by contacting employers personally or by mail, discussing manpower needs, and inviting them to the workshop. The information gained from these employers, the manpower planner, and the manpower planning council would be used as the basis for the workshop.

3. The workshop presentation could be conducted in one of several possible formats depending upon the needs of the employers and the desires of the manpower planner or planning council. Possible formats would be: (a) data feedback and discussion by participants, (b) problem-solving exercise to teach skills and focus on manpower problems, (c) panel made up of parties vital to the success of CETA programs--planners, institutions, elected officials, employers, employees, etc., (d) discussion led by MDS to better understand the needs of people (especially disadvantaged) and how managers or supervisors can better work with people.

4. As follow-up to the workshop, MDS would be available to assist individual employers as needed to resolve manpower problems in their organizations, or to pave the way for assimilating disadvantaged workers into their organizations and to help design effective training programs for OJT slots, etc.

Expected Results:

1. Increase the number of employers involved in CETA manpower programs.

2. Improve understanding among employers of problems faced by disadvantaged workers.

3. Develop appreciation for and working relationship with employers and manpower planners, institutions, etc.

B. Service: Customized workshops based on local problems and needs of public officials with a manpower emphasis.[6]

Purposes:

1. To provide local public officials with an opportunity to indicate their feelings about CETA manpower programs and how they affect the local jurisdictions.

2. To tailor workshops based on individual local public officials' comments so that the workshops are meaningful to the officials.

3. To give the local government officials an opportunity to hear a report from the area manpower planner and ask him questions about the current manpower programs.

4. To provide the local government officials with the opportunity to discuss common problems of the workshop.

5. To instruct the local government officials on how they can determine what their jurisdictions' manpower needs may be and how local manpower funds can help them to meet those needs.

Action Plan:

1. MDS would contact local public officials who would be attending the workshop as designated by the area manpower planner. The purpose of the contact would be to find out the needs and problems that the local officials particularly had with respect to manpower-related issues.

2. MDS would indicate to the manpower planner the types of problems and needs that the local public officials had indicated in the interviews that would be of particular concern to the manpower planner.

3. MDS would prepare all materials necessary for the workshop based on the interviews with the local public officials and information from the manpower planner.

4. MDS would conduct the workshop under the direction of the area manpower planner.

5. MDS would make any follow-up contacts with the local public officials as directed by the area manpower planner following the workshop.

6. MDS would provide a report to the area manpower planner and others designated by the planner on the results of the information gathered from the local public officials and make recommendations for future actions.

Expected Results:

1. Local public officials would have the opportunity to indicate the types of needs and problems they have in their jurisdictions, especially those related to manpower.

2. The manpower planner would have the opportunity to give the local public officials an update on local manpower programs, as well as answer any questions the local officials might have.

3. Local public officials would be able to more realistically evaluate their own jurisdiction's manpower needs and cooperatively work with the area manpower planner to develop programs to meet those needs.

4. The desires of the CETA legislation would be served through the implementation of manpower programs designed to the specifications of the local public officials, as well as meeting the legal guidelines of CETA.

II. Diagnostic Services: Provide objective data-gathering and analysis.

Purposes:

1. Develop an information-gathering system to survey and update data on the manpower needs of the area.

2. Determine the employer manpower needs in terms of skills required, numbers of employees wanted, in-house training capability available, etc.

3. Determine the adequacy of the institutional training facilities and programs in meeting the needs of eligible employers and potential employees.

4. Determine the characteristics and location of persons eligible for assistance under manpower programs, and assess the skill needs (life and/or work) these persons have to become employable.

5. Compare the employer needs with the disadvantaged person's skills and determine how the training resources (OJT or institutional) available can be used to match the person with the job or vice versa.

Action Plan:

1. MDS would coordinate with the manpower planner to determine what information sources are currently being used to assess employer needs, institutional training capabilities and eligible participant skills.

2. Area survey strategy would be mapped out by MDS and the manpower planner to gather additional appropriate data on employers, institutions, and disadvantaged persons.

3. MDS would conduct a survey using data-gathering techniques appropriate to the degree or accessibility of the data needed.

4. Collected data would be compiled and analyzed by MDS/AOG manpower planner.

5. Action plans to fit resources with identified needs would be developed. New and innovative training programs based upon the real community needs could be prepared for testing and implementation.

6. An information-gathering system would be established to monitor the changing manpower needs of the community. This could be done by periodically recontacting a cross-section of representative employers or institutions by personal contact and/or by mail to continually update the data base.

Expected Results:

1. Provide CETA staff with accurate data on employer needs, institutional capabilities, and disadvantaged skills.

2. Provide information to training institutions needed to make training programs responsive to employer needs.

3. Acquaint employers with purposes and programs of CETA.

4. Determine if services being provided under CETA are appropriate to the community needs and, if not, either modify the programs or create new ones to meet the needs.

III. Evaluation Service. Evaluation of manpower program effectiveness.

Purposes:

1. Evaluate the effectiveness of various manpower training programs being sponsored under CETA from the standpoint of: (a) sponsor, (b) institution, (c) employer, and (d) trainee.

2. Determine whether resources are being used effectively. Are programs being sponsored just to use up funds, or are they being developed and funded to meet specific needs of employers and trainees?

3. The personal interview data would be supplemented by a written questionnaire to contact a large sample of former trainees.

4. The evaluation data collected would be compiled and analyzed with the AOG manpower planner/manpower planning council to determine the strengths and weaknesses of the current programs and to revise or restructure future programs to better meet the needs of the community (employer and trainee).

5. The evaluation results would be shared with other involved agencies or institutions which seek to assist disadvantaged employees or in other ways increase the effective utilization of the community's total human resources.

Expected Results:

1. Reduce turnover of trainees by developing more meaningful training.

2. Increase employer awareness of employee needs and expectations to increase retention once employees are trained.

3. Improve the design and operation of manpower programs.

IV. Technical Services. In addition to or growing out of previously described services, MDS could provide local CETA manpower planners with the following types of technical services.

A. Assist OJT contract employers to develop or improve training programs to ensure that the programs are not just disguised wage subsidies without meaningful training.

B. Assist skill centers or other institutional training organizations in using survey feedback data to update and improve training curricula and programs.

C. Provide specialized management/supervisory training to individual employers or groups of employers employing the disadvantaged.

D. Develop work skills/life skills programs to focus community resources on problems of disadvantaged workers.

E. Develop and conduct in-service training for CETA manpower staff.

F. Assist employers to restructure jobs and develop career mobility patterns so that more real job opportunities for disadvantaged workers may be created, instead of entry-level, dead-end jobs as the outcome of manpower program placement.

A. Service: Technical assistance to OJT contract employers.

Purposes:

1. To work with firms which currently have or have had OJT contracts to train workers. This work would consist of evaluation of current training efforts and development of plans for updating or improving future training.

2. To identify and work with new firms to help them implement effective OJT training programs. These programs will be designed to provide the firm with the needed skills, while providing the trainee with work skills which will lead to full-time meaningful employment.

Action Plan:

1. The MDS staff would be on-call to assist any current or new OJT program contract firm to implement or improve their program. This service would be coordinated with but in addition to the proposed needs survey and evaluation activities.

2. This service would be tailored to the needs of the program sponsor and the contract firm depending upon the unique requirements. MDS services would concentrate on assisting the firm to identify needed skills and develop a training program to teach these skills to disadvantaged workers. MDS would also assist the firm to develop and implement supervisory training to sensitize supervisors and trainers to the needs of workers (especially disadvantaged) and how to teach them work or trade skills.

3. Surveys have shown that all too often OJT training programs are not successful because there is a lack of sufficient preparation on the part of the trainee and the OJT employer. Many employers have also indicated a willingness to participate if professionally competent assistance were available to help them design and implement the training program. Programs need to be developed to better prepare workers for employment both before and during the training period. Preparing trainees to become productive employees requires the employer to plan and conduct a realistic training program. MDS would assist those employers who do not have the resources to set up, monitor, and/or improve training programs.

Expected Results:

1. Improve retention of CETA-sponsored trainees by providing training which would better meet the expectations of employers and trainees.

2. Training quality would be greatly improved by providing planning assistance and evaluation of new or in-progress programs.

3. Prepare trainees for permanent employment with opportunities for upward mobility. Good training would provide these opportunities by developing needed skills while building employee loyalty.

4. Develop more productive workers, which will produce an increased demand for workers. This presents opportunities to place more disadvantaged workers.

B. Service: Technical assistance to skill centers and other institutional (classroom) training organizations--including occupational training, academic training, basic or remedial education, skill upgrading, etc.

Purposes:

1. To better match the vocational training available in the community (vocational, skill centers, private schools, etc.) with the occupations in which skill shortages exist and where there is a "reasonable expectation" for employment.

2. To provide institutional training which will prepare trainees for jobs with a reasonable career occupation rather than just in clerical, sales, and service occupations which all too often tend to dead-end or low-paying jobs.

3. To provide pre-employment training which would be preparatory for OJT training.

Action Plan:

1. This service would be a follow-up to the diagnostic or evaluation services discussed earlier in this proposal.

2. MDS would feedback the results of surveys and evaluations to specific institutional training organizations. MDS would consult with these organizations to assist them in converting the feedback into specific program changes or in developing new programs better suited to the needs of the local area and target population.

Expected Results:

1. Increase the number of trainees placed in productive employment upon completion of institutional training programs.

2. Decrease the number of dropouts from institutional training programs by improving training and increasing the possibility of employment by better preparing the trainees to meet employer needs.

C. Service: Conduct management/supervisory training for employers, individually or in groups.

Purposes:

1. To provide training which will develop management and supervisory skills in the handling of human resources.

2. To make managers and supervisors more sensitive to the needs of employees, especially disadvantaged employees.

Action Plan:

1. MDS would conduct a preassessment to identify training needs. This could be done as part of the diagnostic service discussed earlier or as a separate activity.

2. Design a training program to meet the needs identified in the preassessment.

3. Conduct the training.

4. Evaluate the training and ensure that the training will be carried back to the job through follow-up activities.

Expected Results:

1. Better trained management and supervisors.

2. Managers and supervisors will be more sensitive to and able to cope with the needs of disadvantaged workers.

D. Service: Life skills/work skills programs.

Purposes:

1. It has become increasingly apparent that to effectively incorporate the disadvantaged workers into the labor force requires more than just work skills training. What is needed is a broad-based life skills training program which focuses the total community resources upon the total life needs of the disadvantaged worker. Using the job site as a locus of information, concern, and assistance, a "life skills" program provides the means of identifying a disadvantaged person's deficiencies (work skills, education, health, social skills, etc.) and seeks to correct them by using both work-related and other community resources.

Action Plan:

1. Conduct a survey of the community to determine what resources are available to assist persons to develop life skills.

2. Conduct a survey of employers of disadvantaged persons to determine what types of deficiencies are causing high turnover of these employees, and what work and life skills are needed to overcome them.

3. Serve as a catalyst to design appropriate programs needed and match appropriate resources to provide the skills needed.

Expected Results:

1. New workers become better prepared for employment by developing work skills and life skills.

2. The turnover of disadvantaged persons placed in employment is reduced.

3. The total needs of disadvantaged persons are identified, and the community resources are marshalled to assist in a coordinated effort.

E. Service: Develop and conduct in-service training for CETA manpower staff.

Purposes:

1. Determine what skills need to be developed by manpower planning staff and design training to correct these deficiencies.

2. Develop a general training program to initially train or orient new CETA staff members.

3. Provide for continuous in-service training.

Action Plan:

1. MDS would assist the AOG manpower planner in conducting a training needs study of the CETA staff to determine what needs exist.

2. MDS, in cooperation with designated CETA staff, would do any or all of the following: (a) develop and conduct in-service training, (b) assist in developing in-house, in-service training, or (c) provide liaison with other

organizations to provide training which cannot be developed and conducted internally or could be more efficiently provided by established programs.

3. MDS would provide training to help staff members work more effectively with disadvantaged persons and also employers with whom they may have contracts.

Expected Results:

1. Better trained AOG manpower staff, better able to work with disadvantaged persons.

2. Make manpower staff more sensitive to the problems, concerns, and interests of employers.

3. Manpower staff would become better planners, not just administrators.

F. Service: Develop and help implement upgrading opportunities and career mobility patterns among public and private employers.

Purposes:

1. To appraise the structuring of jobs and positions in client organizations to determine: (a) the prevalence of entry-level, dead-end jobs that exist; (b) the characteristics of the incumbents of these jobs; (c) the recruitment, placement, and promotion policies for these dead-end jobs and positions; and (d) the impact these jobs have on direct and indirect measures of productivity, job satisfaction, morale, turnover, and related critical criteria.

2. To assist the employer in restructuring jobs and positions where appropriate to help rationalize his internal labor market system and increase the probability of retaining and promoting qualified entry-level placements.

3. To coordinate the training needs of the employed worker with the training demands of both his present job and those related jobs associated with his particular career track to ensure performance and promotability among qualified workers.

Action Plan:

1. An initial extensive analysis is required to determine the current relationships among jobs in the client organization, the grouping of jobs into job families, the development of vertical and horizontal career tracks or paths, a training

needs and skill needs survey for each career track, and an assessment and profile of skills, abilities, expertise, and career interests among incumbents.

2. If appropriate and in conjunction with representatives identified by the employer (personnel, affirmative action, and training people are logical representatives), tasks, positions, and jobs are analyzed and restructured into career paths. Organization policies, guidelines, and procedures (formal and informal) are changed to accommodate and support these structural changes. Extensive and intensive training of incumbent administrative and supervisory personnel will probably be required toward this end.

3. Systematic training and assessment of incumbents to operationalize the career mobility system. Feedback of the consequences of policy, structural, and supervisory changes to continually adapt and adjust the means toward the fulfillment of the end or long-term objectives.

Expected Results:

1. Increased employment opportunities for the target population.

2. Higher productivity, morale, organization climate, and individual satisfaction.

3. Higher retention of entry-level placements, particularly those coming from manpower programs.

4. Lower turnover, absenteeism, waste, grievances, and related "people problems" associated with high levels of career frustration.

5. A more equitable, comprehensive, and comprehensible system of equal opportunity--based on merit--within the internal labor market.

6. Compliance with federal EEOC guidelines.

Financial Arrangements for MDS Services

The above list of services has been prepared to serve as a discussion document for the AOG manpower planner and manpower planning council to help identify those services MDS is capable of providing which appear to be most relevant to the interests and needs of the AOG. It is anticipated that the specific services to be made available by MDS to the AOG and the financial arrangements under which they will be provided will be mutually agreed upon after further negotiations. These discussions should take place as soon as possible, so that the desired services may be properly planned and scheduled for delivery during the 1975-76 fiscal year (or sooner if desired).

SUMMARY OF PROPOSAL

Services	Purposes	Action Plan	Expected Results
I. Outreach:			
A. Seminars for employers not using CETA programs	- Marketing approach - Generate employer sensitivity to CETA - MDS teach skills	- Develop list of contacts - Make preassessment of needs - Present workshop with CETA staff - Follow-up	- Increase employer participation in CETA programs - Improve employer understanding of disadvantaged workers - Develop CETA/employer working relationship
B. Workshop for local public officials to acquaint them with CETA	- Provide forum for public officials and CETA - Tailor workshop to needs - Instruct local public officials on manpower needs and problems	- MDS contact local officials - Feedback results of contact to workshop & manpower planners - Conduct workshop - Follow-up and report to planner	- Planner would better understand manpower needs and concerns of local officials - Public officials become more knowledgeable of CETA - Enable planner to develop programs better suited to needs of local areas
II. Diagnostic Services	- Develop information-gathering system - Determine employer manpower needs - Determine adequacy of institutional training - Determine characteristics of disadvantaged persons - Compare and match characteristics and needs	- Coordinate with CETA staff to plan survey - Conduct survey - Analyze data - Develop action plan - Provide system to continue data-gathering	- Provide CETA staff better information - Provide institutions better information - Acquaint employers with CETA - Know if CETA is meeting needs of area

MDS EXPERIENCE

Related Experience

IA. Area workshop for employers in Cache Valley, 1973.

II. Survey of needle-trade industry, 1973.
Apprenticeship study, 1975.
Consultancy with approximately 80 private and public firms and industries, including Logan City, 1974; LeVoys, 1973-74; L & M Trailer Mfg., 1974-75; Thorn Construction, 1974; Burgin Mine, 1973-75.

CETA Experience

IA. Seminar for interested employers, in cooperation with Uintah Basin AOG Manpower Planning Office, August 1975.

IB. Three workshops conducted in cooperation with the 6-County Commissioners Organization Manpower Planning Office, March-May 1975.

II. Survey currently being developed and administered in conjunction with Uintah Basin AOG, Uintah Basin Vocational Center and associated manpower delivery agencies.

Services	Purposes	Action Plan	Expected Results
III. Evaluation Services	- Evaluate CETA-sponsored programs - Determine how effectively resources are being used - Compare CETA programs with other manpower programs	- MDS coordinate with planner - Contact employers, institutions, and trainees - Personal interview and mailed responses - Compile and analyze data - Share data results	- Reduce turnover of trainees - Increase employer awareness of employee needs - Improve design and operation of manpower programs
IV. Technical Services			
A. Assist OJT employers to develop or improve training programs	- Work with OJT contract firms to improve training - Assist new OJT firms to set up training	- MDS on-call to help new or established OJT contract firms - Conduct training needs survey to tailor training program - Develop training program to meet employer & employee needs	- Improve OJT retention rates - Better quality training - Trainees become better employees - Increase worker productivity - Increase demand for new employees
B. Assist institutional training organizations	- Better match institutional training to skill shortage needs - Provide better pre-employment training	- Follow-up to diagnostic services - Consult with institutions to convert feedback from diagnosis into program improvements	- Increase the number of placements - Decrease number of dropouts
C. Conduct management/ supervisory workshops	- Provide training in human relations skills - Increase sensitivity to needs of disadvantaged employees	- Preassessment survey of needs - Design program to meet needs - Conduct training - Evaluate training	- Better trained supervisors - More sensitive supervisors

MDS EXPERIENCE

Related Experience

III. See II. above. Evaluation is included in the consulting process.

IVB. Hill Air Force Base training for civilian training staff, 1975.
Internal Revenue Service, Ogden Service Center staff training, 1974.
USU Extension ESTD staff training and development, 1974-75.

IVC. UNIA workshop series, 1973.
LeVoys workshop, 1974.
E. A. Millers workshop, 1973-74.
Cache Valley area workshop, 1973.

CETA Experience

III. Evaluation of NAB-JOBS as a result of work done for Utah County workshop in cooperation with Mountainlands AOG Planning Office and local Employment Security Office, November 1974-January 1975.

IVA. Related CETA work with Hurco Industries in cooperation with Northern Wasatch AOG Manpower Planner and local Employment Security Office.

IVB. Work currently being done with Uintah Basin AOG, Uintah Basin Vocational Center, and associated manpower delivery agencies.

IVC. Workshop for OJT employers in Utah County in cooperation with Mountainlands AOG Planning Office and local Employment Security Office, January 1975.

CE009 861

Services	Purpose	Action Plan	Expected Results
IV. Technical Services (cont.)			
D. Develop work skills/ life skills programs	- Incorporate the disadvantaged person into the workforce - Identify specific work-related training and personal needs of the employed workforce	- Conduct survey of community resources to assist disadvantaged - Conduct survey of disadvantaged persons - Serve as a catalyst to match employer's need with resources to assist	- New workers better prepared for employment - Turnover of disadvantaged workers is reduced - Total needs of disadvantaged persons are addressed
E. In-service training for CETA staff	- Determine skills needed and design training - Develop general training program for new staff - Provide continuous in-service training	- Training needs study - Conduct or coordinate training - Assist in becoming more effective in working with trainees and employers	- Better trained staff - Staff more sensitive to needs of employers and trainees - CETA staff become better planners
F. Assist employer to restructure jobs and provide career mobility	- Appraise the structuring of jobs to determine career mobility - Assist employer rationalize internal labor system - Coordinate training needs with job demands	- Analyze employer organization - Restructure jobs where appropriate - Operationalize career mobility system	- Increased job placements - Higher productivity and morale - Higher retention - Lower turnover - Comply with EEOC guidelines

MDS EXPERIENCE

Related Experience

IVD. Quality of Rural Life Program, Burgin Mine, 1975.

IVF. Logan City, 1974.
LeVoys, 1974.
Utah State University, 1972 and 1975.

CETA Experience

IVD. Quality of Rural Life Program with Burgin Mine, 1975.

IVE. Training for Employment Security staff, Northern Utah Region, February 1975.

Training for Employment Security staff, Salt Lake City, May 1975.

IVF. Proposal, not practiced as yet.

159